



City of Dryden Business Gap Analysis (Final Report)

June 2022

EXPLORER
SOLUTIONS

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1. Dryden Retail Trade Area Demand, Supply, and Commercial Gaps Analysis

The City of Dryden continues to be a retail and trade centre supporting people and organization from a number of towns, municipalities, indigenous communities and unorganized territories, extending well beyond its municipal boundaries to include regions to both the east and west. The City's location as a regional hub remains a key factor in the success of the City in gathering retail and trade opportunities. To enhance business activities and to accommodate future growth opportunities, it is essential for the City to develop a clear portrait of its retail trade area demand and supply and identify any gaps. The objective of this Business Gap Analysis is to better understand the extent, nature, and retail-commercial potential of the Dryden retail market over time, and particularly how that potential relates to current market offerings/inventory.

A thorough assessment of the retail and trade market in the City of Dryden (and surrounding area) has been undertaken utilizing the latest business count data, City of Dryden business registration data, Industry Canada NAICS code data, engagement with various stakeholders, City staff and aggregated mobile location data. The Retail and Trade Market Analysis is structured around four (4) key deliverables from the Retail Trade Area delineation, followed by a quantitative and qualitative assessment and analysis of the retail sectors, which leads to the identification of business gaps and a series of recommendations.

1.1 Retail Trade Area Delineation

1.1.1 Municipalities and Townships Supported by City of Dryden

The City of Dryden support and provides services to a large portion of the northwest Ontario population. By road, the City provides services-in-reach to several surrounding organized municipalities, indigenous communities and unincorporated townships throughout the Kenora District. Data collected to determine Dryden's retail trade delineation area is based on 2019 and 2021 mobile data analytics of Canadian visitors. Tourism and visitor movements from the USA or other international locations was not reflected in the data.

The City supports seven (7) surrounding (organized) municipalities, which consists of a combined population of 36,170¹ (including the City of Dryden). An additional nine (9) small unincorporated townships also depend on the City of Dryden for essentials and other necessary services; however, their resident population figures are too small to be reported individually, but on an aggregated basis, the combined population is estimated at 3,621 (Northern Policy Institute, 2021). Dryden also supports six (6) indigenous communities² with a total population of 2,275. Table 1 presents the list of municipalities (with population), unincorporated townships and their distances from the City of Dryden.

¹ <https://censusmapper.ca/#8/49.824/-92.527>

² The listed indigenous communities are derived from Statistics Canada 2021 Census, reported as Indian Reserves in the Standard Geographical Classification (SGC) system.

Table 1 – Municipalities and Townships Supported by City of Dryden³

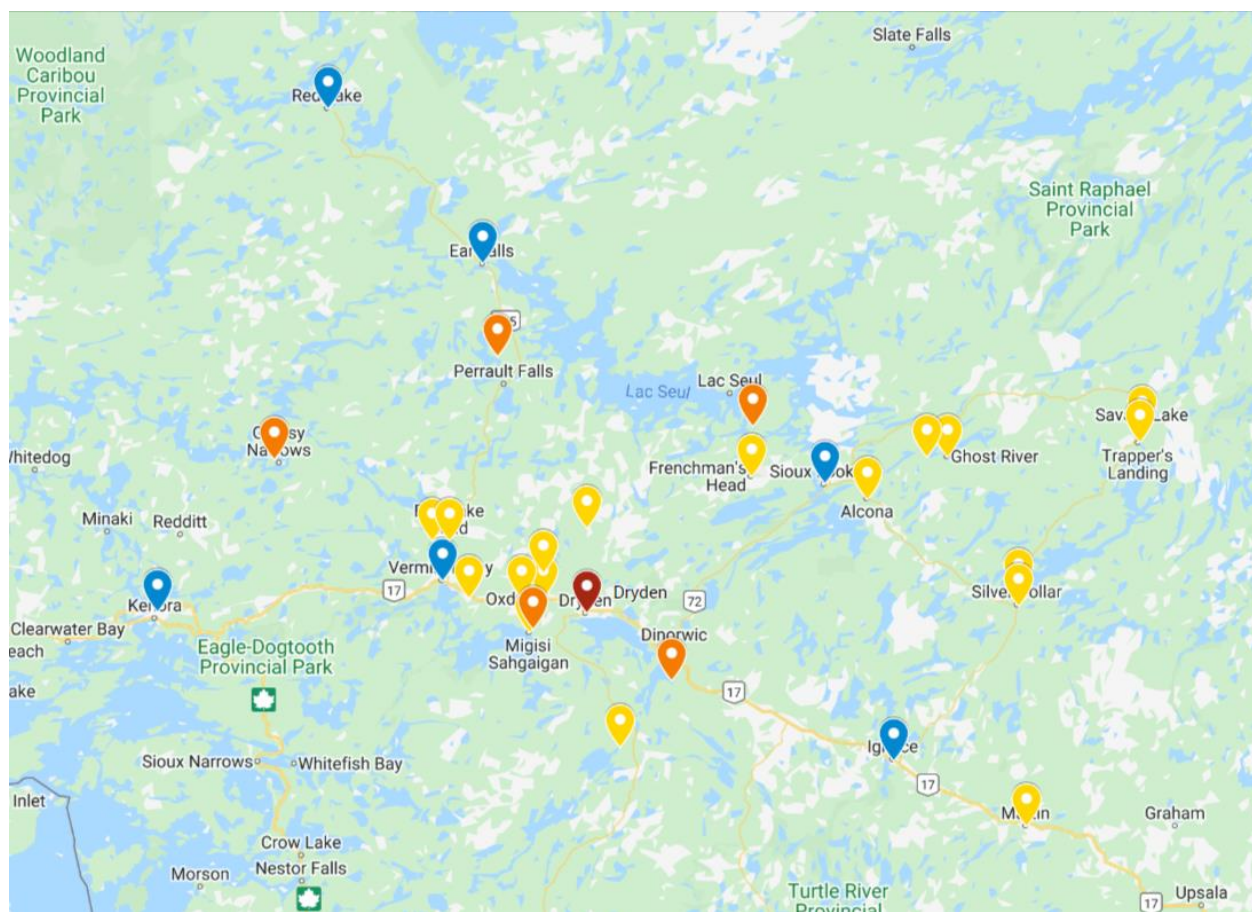
Municipality	Population (2021)	Distance from Dryden (kms)
Dryden (CY) (CSD)	7,388	-
Ear Falls (TP) (CSD)	924	146
Ignace (TP) (CSD)	1,206	106
Kenora (CY) (CSD)	14,967	138
Machin (MU) (CSD)	1,012	45
Eagle River	-	31
Minnitaki	-	21
Vermillion Bay	-	44
Red Lake (MU) (CSD)	4,107	216
Sioux Lookout (MU) (CSD)	5,839	99
Alcona	-	116
Sub-Total:	35,443	
Indigenous Communities		
Eagle Lake 27 (IRI) (CSD)	257	17
English River 21 (IRI) (CSD)	584	206
Lac Seul 28 (IRI) (CSD)	1,022	*
Wabauskang 21 (IRI) (CSD)	57	117
Wabigoon Lake 27 (IRI) (CSD)	175	39
Sub-Total:	2,095	
Unincorporated		
Dinorwic	3,621	30
Eton-Rugby		23
Oxdrift		16
Quibell		61
Richan		25
Savant Lake		210
Silver Dollar		167
Waldhof		38
Wabigoon (LSB)	419	20
Sub-Total:	4,040	
Total:	41,578	

* Dryden to Lac Seul 28 (IRI) (CSD) using point-to-point distance is approx. 70kms

³ Abbreviations: CY-City; TP-Township; MU-Municipality; IRI-Indian reserve / Réserve indienne; CSD-Census Sub-division

Figure 1 below presents the municipalities (blue flags) and unincorporated Townships (yellow flags) that depend on the City of Dryden for essentials and other services. Dependability on the City of Dryden significantly drops off west of Vermilion Bay (Township of Machin) which is situated 45kms west of Dryden due to the fact that 93kms further west of Vermilion Bay is the City of Kenora (approximate population 15,096) which will have many of the same and in some instances a broader array of individual products and/or services for purchase. When considering areas to the east of Dryden, it is anticipated that residents as far east as those who reside in Martin (distance of 151kms) will travel to Dryden for essentials and other products and services. Those who reside in Upsala (distance of 141kms to Thursday Bay) are more likely to commute to Thunder Bay for their needs. The distance between Martin and Upsala is approximately 62kms.

Figure 1 - Retail Trade Area by Municipality



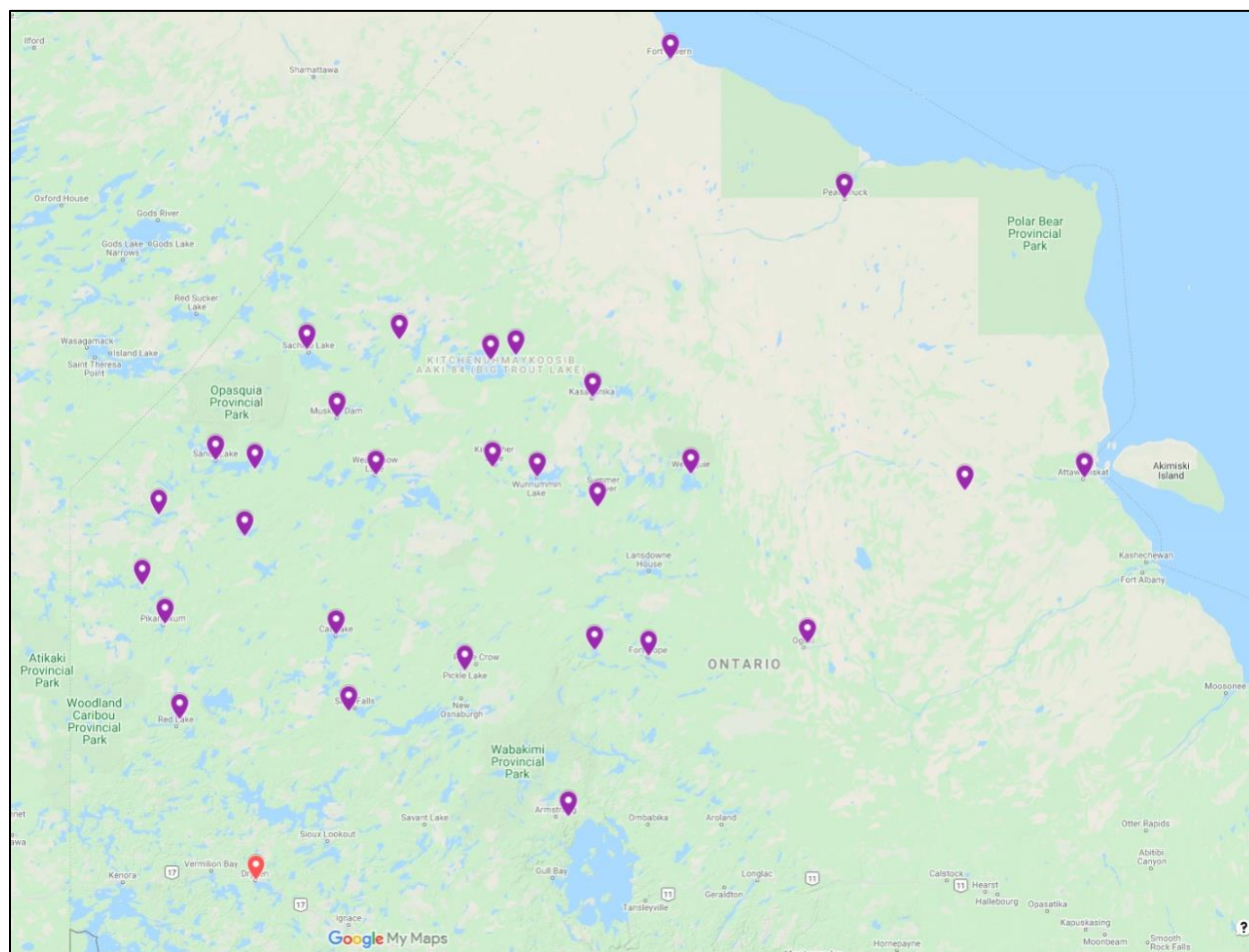
* Municipalities are identified as blue flags, unincorporated Townships as yellow flags, Indigenous Communities as orange flags and the City of Dryden as a red flag.

- The City of Dryden via the Dryden Airport is also capable of supporting the commercial and retail needs of those living in the remote parts of northwestern Ontario which are only accessible by air. Presently commercial air service from these communities goes to Sioux Lookout and Red Lake

Airports. Travelers then commute to Dryden for shopping and services. The following 30 airports are presented in Figure 2:

<ul style="list-style-type: none">• Angling Lake / Wapekeka Airport• Armstrong Airport• Attawapiskat Airport• Bearskin Lake• Big Trout Lake Airport• Cat Lake Airport• Deer Lake Airport• Ear Falls Airport• Fort Hope Airport• Fort Severn Airport• Kasabonika Airport• Keewaywin Airport• Kingfisher Lake Airport• Lac Round / Weagamow Lake Airport• Miminiska Airport	<ul style="list-style-type: none">• Muskrat Dam Airport• North Spirit Lake Airport• Ogoki Post Airport• Peawanuck Airport• Pickle Lake Airport• Pikangikum Airport• Poplar Hill Airport• Red Lake Airport• Sachigo Lake Airport• Sandy Lake Airport• Slate Falls Airport• Summer Beaver Airport• Victor Mine Airport• Webequie Airport• Wunnummin Lake Airport
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Figure 2 - Service Area by Remote Ontario Airport



* Airports are identified as purple flags and the City of Dryden as a red flag.

1.1.2 Mobile Analytics

Mobile analytics help to enhance the understanding of visitor statistics and movement patterns using privacy-compliant mobile movement data collected from location-enabled mobile devices. As previously stated, the data collected to determine Dryden's retail trade delineation area is based on 2019 and 2021 mobile data analytics of Canadian visitors. Tourism and visitor movements from the USA or other international locations was not reflected in the data.

1.1.2.1 Methodology and Terminology

The cell phone analytics was captured by forming a polygon (geofence) representing the various commercial areas in Dryden (boundaries of the areas) in which mobile movement data was extracted. For the purpose of this study, a geofence was drawn which includes Dryden's downtown core, commercial areas along Highway 17, major employers, schools and educational institutions, and tourism locations such as the waterfront and the arena. In total, the geofence captured an area of 4,385,228 sq. ft. For this analysis, data from Canadian visitors only for 2019 and 2021 was used. Due to the COVID-19 pandemic, multiple public health measures and restrictive travel advisories were carried out in 2020 which resulted

in a decrease in visitor counts and visitor movement patterns. As a result, the 2020 dataset is excluded from this analysis.

Definition of terminologies used in the following analyses:

- **Transient Visitors:** The number of distinct and unique devices that entered the Geofence in the requested time range, regardless of how often they visit. Each distinct and unique device represents a unique transient visitor.
- **Common Evening Location (CEL):** Used to infer the device's home location; it is assigned to the closest Postal Code. Usually, the common evening location of a distinct and unique device represents the home location of the device owner (the transient visitor).
- **Geofence:** A virtual geographic boundary or polygon that represents a particular area of interest used for extracting mobile data.
- **Forward Sortation Area (FSA):** A way to designate a geographical unit based on the first three (3) characters in a Canadian postal code.

1.1.2.2 Regional Transient Visits

1.1.2.2.1 Regional Postal Code Analysis

Figure 3 illustrates the CEL of transient visitors from the greater region with the following key takeaways having transpired between 2019 and 2021:

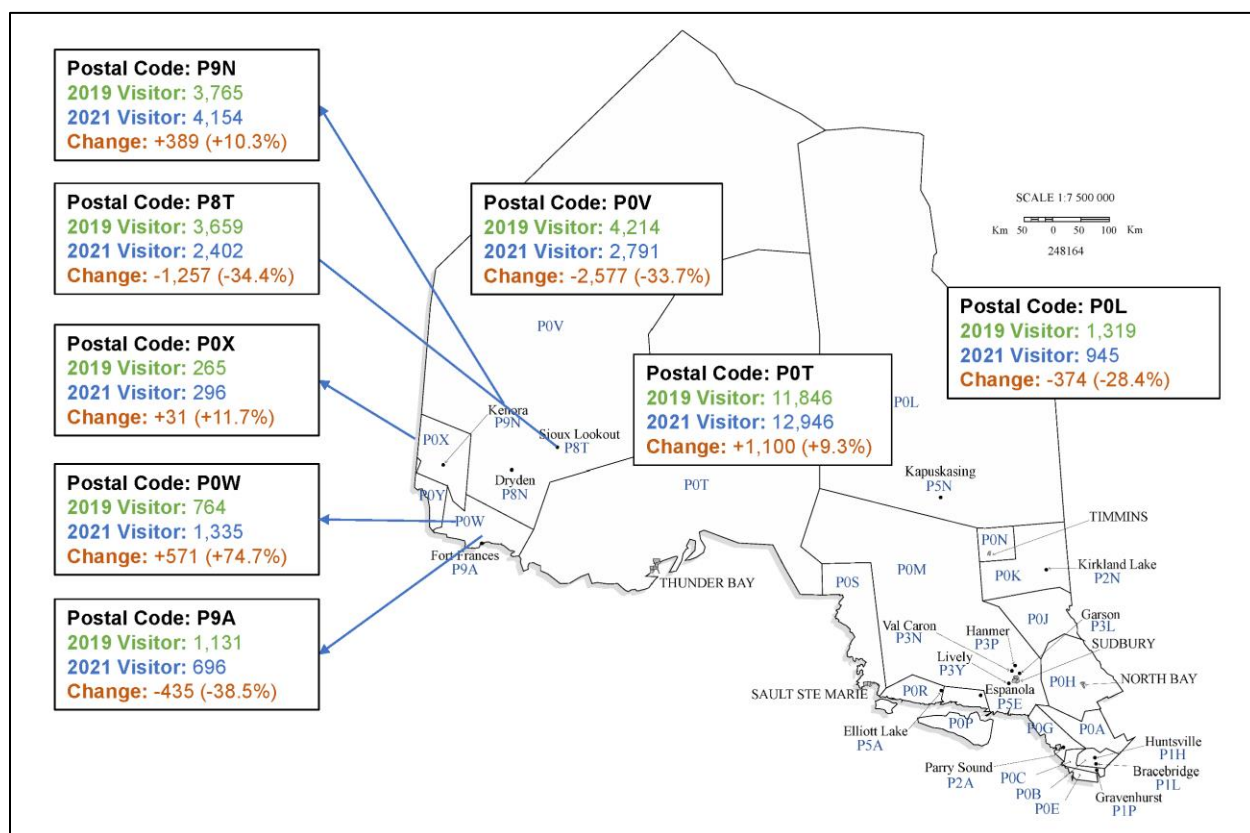
- Transient visitors, with a CEL of Sioux Lookout, decreased from 3,659 to 2,402, equal to a decrease of 1,257 visitors;
- Transient visitors, with a CEL in the northern region (FSA starting with POV and POL, experienced an approximate decrease of visitors by 30%; and
- 1,131 visitors, with a CEL in the FSA of P9A (Fort Frances) visited Dryden in 2019. In 2021, this number decreased to 696, equal to a decline of 38.5%

The results reveal that visitors from Fort Frances, Sioux Lookout, POV and POL FSA visited Dryden less and that there could be a correlation with the reduced travel and travel restriction guidelines that had been in place by the regional health units during the on-going pandemic. Furthermore, there was the cancellation of several hockey tournaments and other activities which historically drew visitors in from these locations. Indoor dining was also not available.

As shown in Figure 3, the FSAs POW, POX, P9N and POT show an increase in visitor counts which means that more people from those areas visited Dryden in 2021 compared to 2019. In Kenora (FSA P9N), an additional 389 people visited Dryden in 2021 compared to the 2019 data. The area of FSA POW which includes Emo, Barwick, Mine Centre, Seine River Village, Lac la Croix and Atikokan saw 571 more people visit Dryden in 2021 compared to 2019.

Overall, the mobility data revealed that the number of Dryden's visitors who have their CEL in the region fluctuated in those two (2) years and no obvious pattern was observed.

Figure 3 - 2019 & 2021 Dryden Transient Visitors CELs by Postal Code



1.1.2.2.2 Distance Decay Analysis

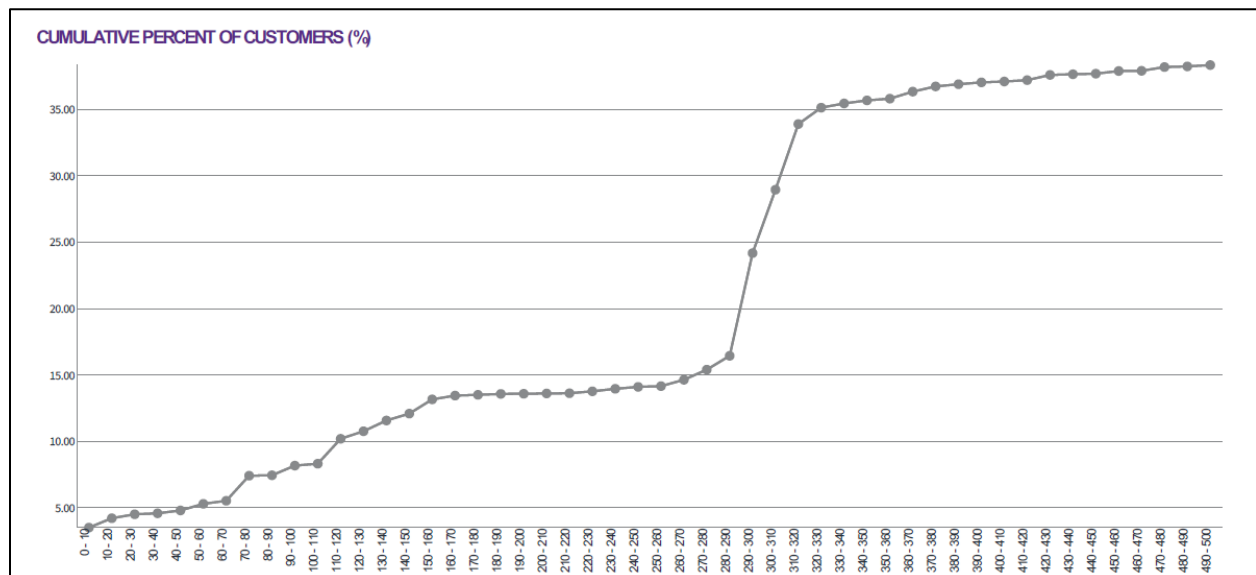
The distance decay data of transient visits illustrates the composition of visits by the distance of their common evening location (CEL) to Dryden's retail and trade area. In 2019, 8.18% of the transient visitors (15,962 people) have a common evening location that is less than 100kms from the city, representing a penetration rate of 79.95%. This means that 79.95% of the people living within 100kms from the city had visited the city in 2019. As the distance decay analysis is expanded, 24.17% of the transient visitors (equal to 47,193 people) reside within 300kms from the city, representing a penetration rate of 16.64%. Total transient visits originating from within 500kms from the city represented 38.33% (equal to 74,839 people, a penetration rate of 6.64%) of Dryden's visitors. The following table summarizes the key statistics from 2019.

This pattern of information indicates that the bulk of transient visits to the city originated from within a 100km radius. When the penetration rate for transient visits between the 100 – 300km band are included, the overall penetration shows an overall decline, however, when the additional transient visits from within the 300-500km band are considered, the overall penetration rates rises as it includes major centres of Thunder Bay and Winnipeg. Table 2 presents the results of the 2019 Distance Decay and Penetration Rate of visits, organized by distance bands and also by cumulative distance from the city.

Table 2 - 2019 Dryden Visitor Statistics

2019 Dryden Distance Decay and Penetration Rate				
Distance Bands (kms) (Common Evening Location)	Visitor Count (unique individual count)	Cumulative Percentage (as a % of all visitors)	Population Count (population in the distance band)	Penetration Rate (as a % of all population living in the distance band)
0 - 50	9,370	4.80%	11,465	81.73%
50 - 100	6,592	3.38%	8,499	77.56%
100 - 200	10,559	5.40%	39,205	26.93%
200 - 300	20,672	10.59%	224,489	9.21%
300 - 400	25,099	12.86%	780,477	3.22%
400 - 500	2,547	1.30%	62,520	4.07%
2019 Distance Decay Cumulative Totals				
0 - 100	15,962	8.18%	19,964	79.95%
0 - 200	26,521	13.58%	59,169	44.82%
0 - 300	47,193	24.17%	283,658	16.64%
0 - 400	72,292	37.03%	1,064,135	6.79%
0 - 500	74,839	38.33%	1,126,655	6.64%

Chart 1 - 2019 Dryden Retail and Trade Area Distance Decay Cumulative Percent Chart



In 2021, 7.25% of visitors (15,575 people) to Dryden's retail and trade area have a common evening location located within a 100km radius from the city, representing a penetration rate of 78.02%, which is lower than the 2019 penetration rate of 79.95%. As the distance decay analysis is expanded, 21.87% of the transient visits (46,980 people) are from individuals originating from within 300kms from the city and 33.35% of the total visitors (71,632 people) live within 500kms from the city. Table 3 presents the results of the 2021 Distance Decay and Penetration Rate of visits, organized by distance bands and also by cumulative distance from the city.

Table 3 - 2021 Dryden Visitor Statistics

2021 Dryden Distance Decay and Penetration Rate				
Distance Bands (kms) (Common Evening Location)	Visitor Count (unique individual count)	Cumulative Percentage (as a % of all visitors)	Population Count (population in the distance band)	Penetration Rate (as a % of all population living in the distance band)
0 - 50	10,590	4.93%	11,465	92.37%
50 - 100	4,985	2.32%	8,499	58.65%
100 - 200	10,573	4.92%	39,205	26.97%
200 - 300	20,832	9.70%	224,489	9.28%
300 - 400	21,972	10.23%	780,477	2.82%
400 - 500	2,680	1.25%	62,520	4.29%
2021 Distance Decay Cumulative Totals				
0 - 100	15,575	7.25%	19,964	78.02%
0 - 200	26,148	12.17%	59,169	44.19%
0 - 300	46,980	21.87%	283,658	16.56%
0 - 400	68,952	32.10%	1,064,135	6.48%
0 - 500	71,632	33.35%	1,126,655	6.36%

Chart 2 - 2021 Dryden Retail and Trade Area Distance Decay Cumulative Percent Chart

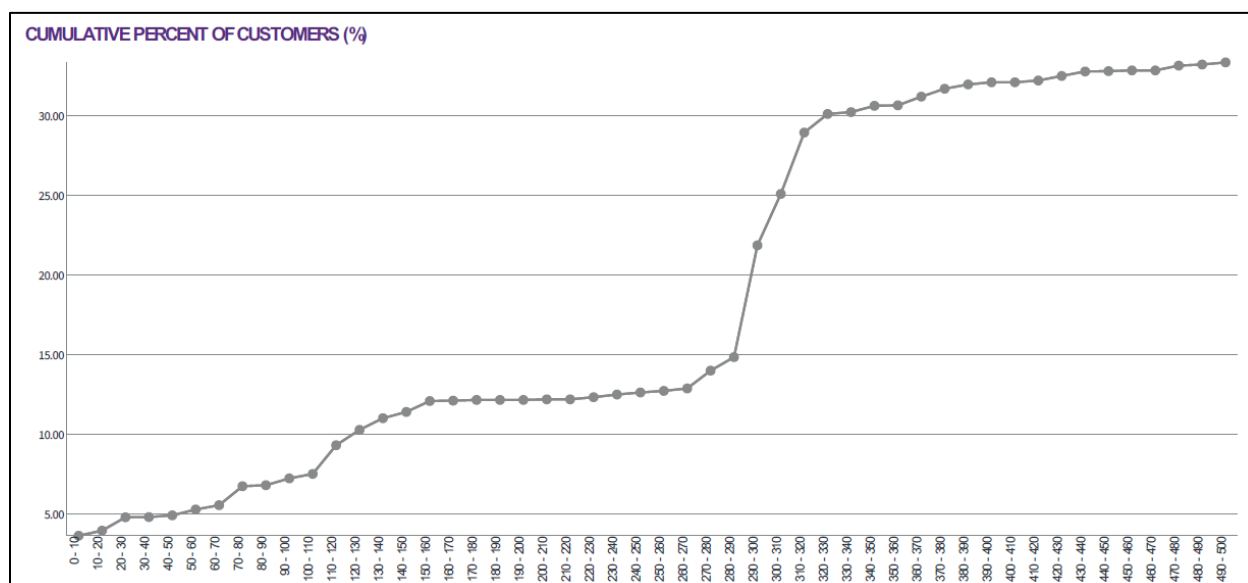
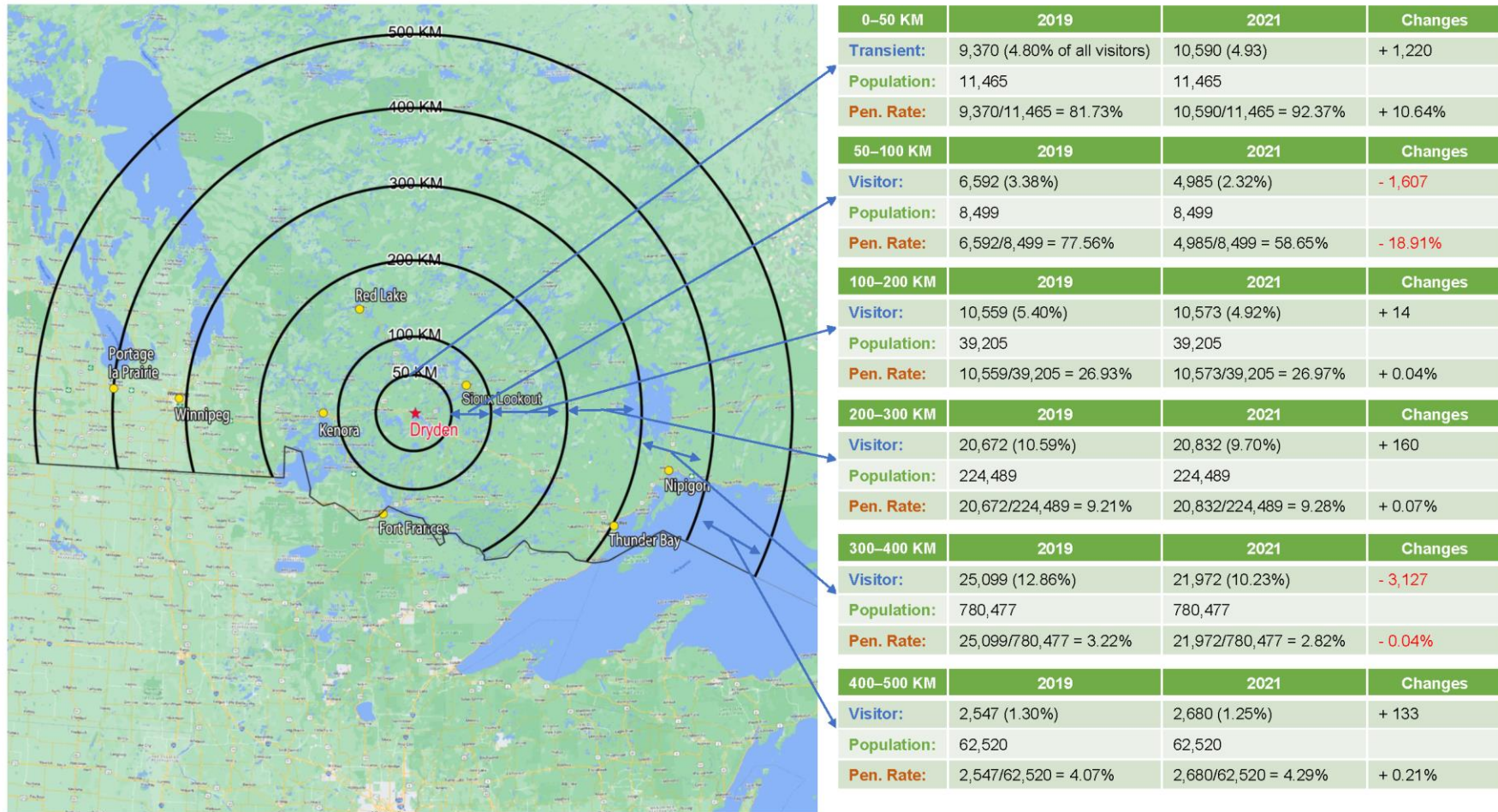


Figure 4 illustrates the distance bands⁴ on the map. The 50 – 200km band consists of major neighbouring communities such as Sioux Lookout, Red Lake, Kenora, and Fort Frances. Major metropolitan areas (Thunder Bay and Winnipeg) are located close to the 300km band. The table on the right side of the map illustrates the transient visit counts, the population in or in between those distance bands, and the calculated penetration rates. It can be observed that, from 2019 to 2021, Dryden’s visitors who live in the 50-100km band decreased by 1,607 (equal to a percentage decrease of 24.3%). The corresponding penetration rate also decreased by 18.91%, indicating that less people who live 50-100km from Dryden visited Dryden in 2021 compared to 2019. Individuals who lived in the 300-400km band also exhibited a decrease of 3,127 (equal to a percentage decrease of 12.5%) between 2019 and 2021.

The COVID-19 pandemic and Dryden’s role in the broader region might explain the decrease of visitors from the 50-100km and 300-400km distance bands. Individuals living in the 50-100km band may travel frequently to Dryden as Dryden provides centralized resources not only for retail and trade activities but also for other essential services. Due to the pandemic, individuals who live in this band may have consolidated their multiple trips into one, had one (1) person from the household travel to Dryden versus the entire household and it is noted that many activities held throughout the city were also cancelled. Additionally, hockey, sports and other activities were cancelled, and indoor dining was not available. For Dryden’s transient visits stemming from the 300-400km band, the decrease in counts might be explained by the pandemic and their close distance to major metropolitan areas – Winnipeg and Thunder Bay.

⁴ It should be noted that the distance bands on the map are for reference only. Actual distance may vary due to different map projections.

Figure 4 - Dryden Transient Visitors Distance Band, Visitor Count and Penetration Rate



1.123 *National Transient Visits*

Looking at National Transient Visits Table 2 and Table 3 show that approximately 35% of Dryden's transient visits have their common evening location within 500km from the city, which means that approximately 65% of Dryden's transient visitors live greater than 500km from the city. The data aligns with the previous qualitative review since Dryden is connected to many other cities, towns and communities along the Trans-Canada Highway and the airport.

The next maps present the common evening location and the count of transient visits from all provinces of Canada. In 2019, the Winnipeg and Thunder Bay area represented the CEL of more than 40,000 of Dryden's transient visitors. An additional 34,000+ transient visits to Dryden originated from the Greater Toronto Area. Other CELs where the majority of Dryden's transient visits originated included the areas of Montreal, Edmonton, Calgary and Vancouver.

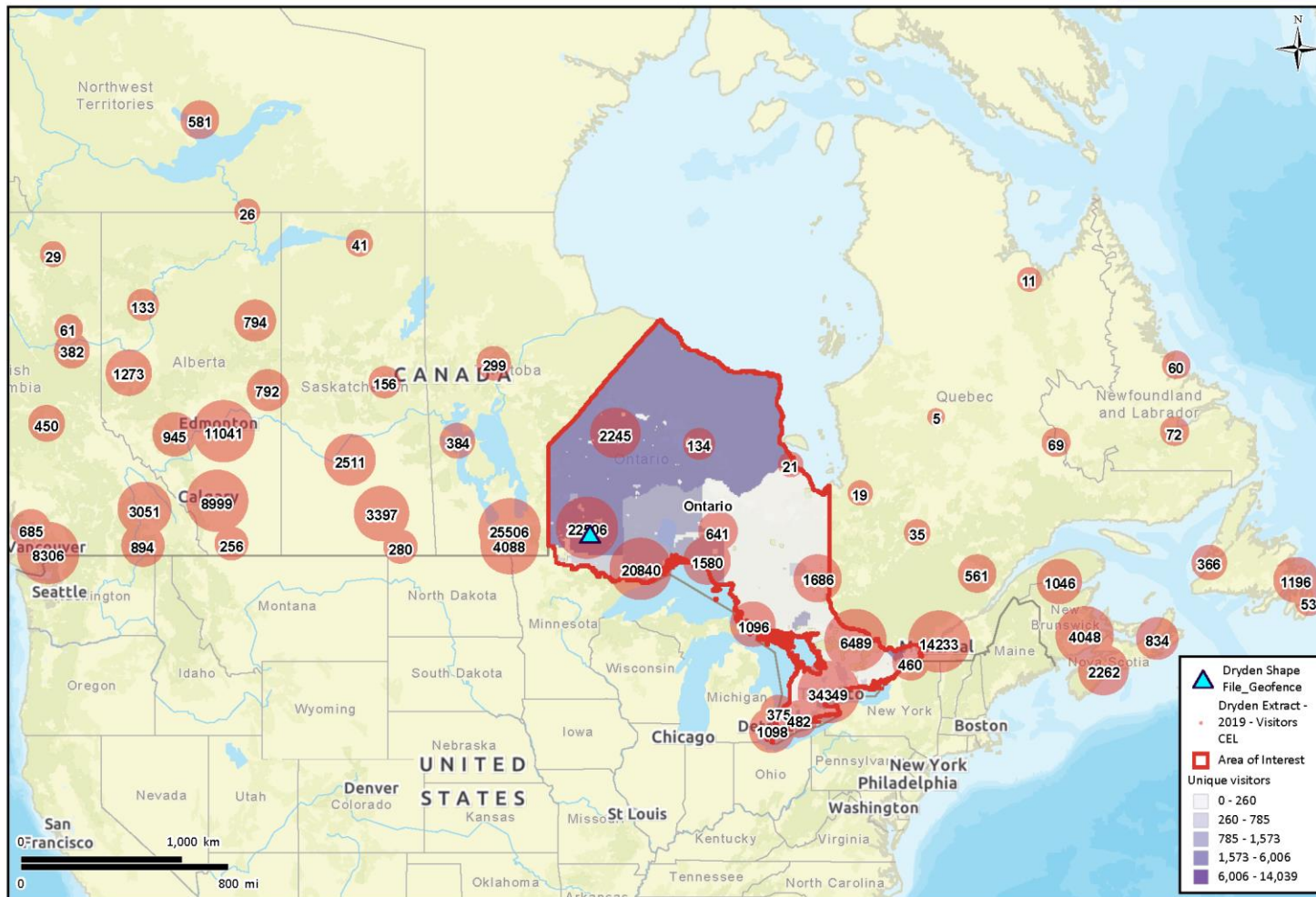
In 2021, transient visits from Edmonton, Winnipeg and Thunder Bay decreased. A small decrease was also observed for transient visits originating from New Brunswick and Nova Scotia, however, an increase in transient visits from Vancouver, Calgary, Toronto and Montreal areas was experienced in 2021.

Overall, the national transient visits map consolidates Dryden's importance in northern Ontario. In recent years, Dryden hosted transient visits from all Canadian provinces. The locations of the most significant transient visits were derived included most of Canadian metropolitan areas such as Montreal, Toronto, Winnipeg, Edmonton, Calgary, and Vancouver. Transient visits from those locations might include tourists, business travellers, friends and family visits, and people who have their destinations elsewhere but stopped in Dryden's for various commercial purpose.

Figure 5 – Dryden’s Transient Visits from Canadian Provinces (2019)

Dryden Extract- 2019- Visitors CEL

ENVIRONICS
ANALYTICS

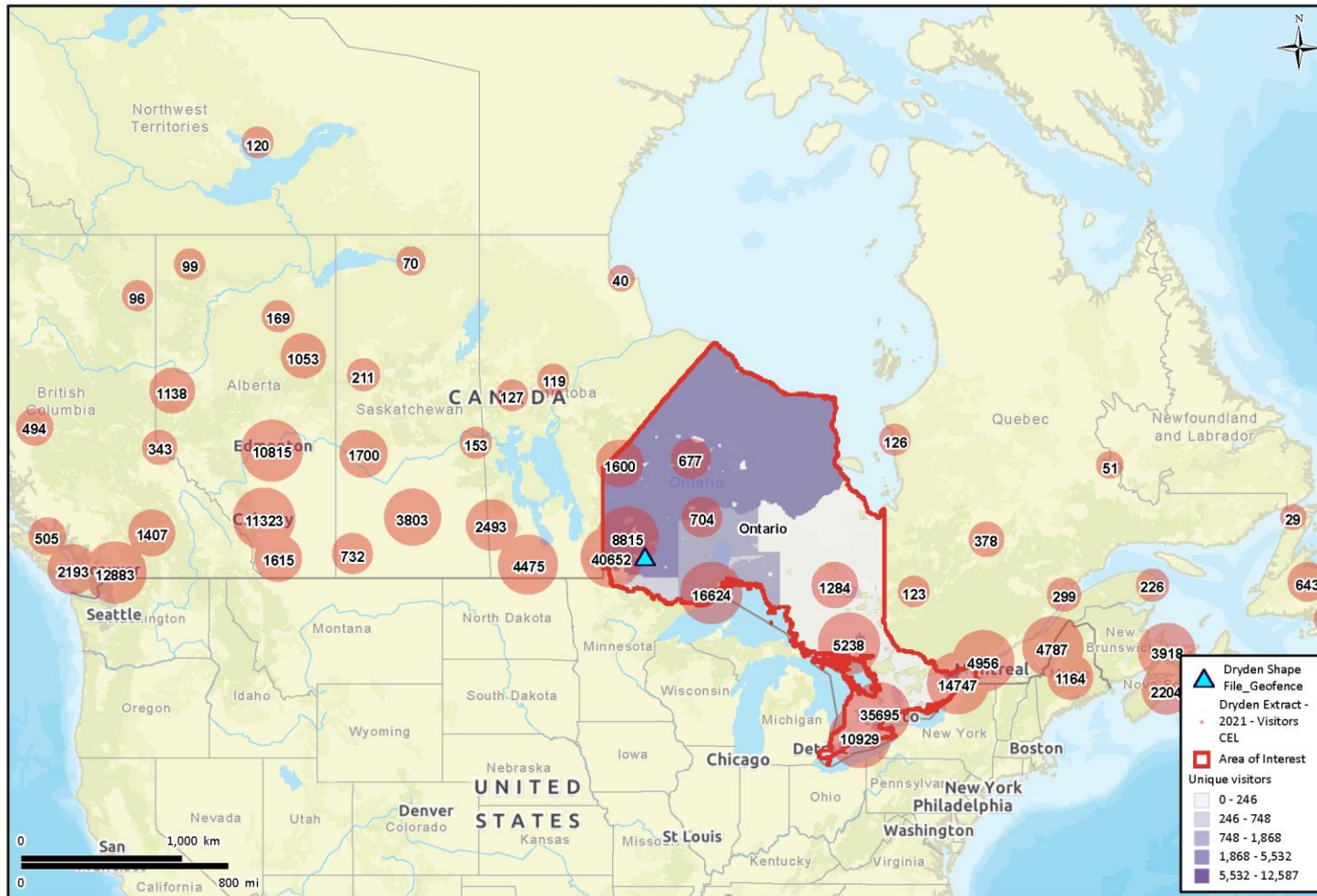


Data Sources: <https://en.environicsanalytics.ca/Envision/About/1/2021>
 Copyright © 2022 Environics Analytics (EA). | © 2006-2022 TomTom
 Basemap Sources: Province of Ontario, Esri, Garmin, FAO, NOAA, EPA, NRCan, Parks Canada Powered by Esri
 Disclaimer: Scale bar is for reference only

Figure 6 – Dryden’s Transient Visits from Canadian Provinces (2021)

Dryden Extract- 2021- Visitors CEL

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Data Sources: <https://en.environicsanalytics.ca/Envision/About/1/2021>
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 Basemap Sources: Province of Ontario, Esri, Garmin, FAO, NOAA, EPA, NRCAN, Parks Canada Powered by Esri
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1.2 Retail Trade Area Transient Visitor Demographic Analysis

To better understand the transient visitors who visited Dryden's retail and trade area in 2019 and 2021, the demographics of those visitors were obtained from the Environics Analytics mobility database. In addition to the mobile analysis, other data sources including Statistics Canada, Oxford Economics and Canada Mortgage and Housing Corporation (CMHC). The analyses presented in the following sub-section uses Ontario as the benchmark to calculate the index value.

1.2.1 Population & Households

The median household maintainer⁵ age of Dryden's transient visitors was 52 in 2019 and 51 in 2021, which is slightly below the Ontario average (Index: 97 - equal to approximately 54 years of age in 2019 and 98 - equal to approximately 53 years of age in 2021). In 2019, 58.2% of the transient visits were from individuals who were married or in a common-law marriage. Approximately 46% of Dryden's 2019 transient visits were from individuals who have a spouse and children at home. In 2021, this percentage increased to 48.6%.

The household size of Dryden's transient visitors remained consistent over those two (2) years. In 2019, 25% of visitors were single and 32% of them were from a household of two (2) persons. Visitors from a household of more than four (4) persons (5+) accounted for 12% of Dryden's transient visits in 2019. In 2021, 22% of the visitors are single and 31% of them were from a household of two (2) persons. Approximately 13% of visitors were from a household of five or more (5+) persons. The percentage of Dryden's visitors that were from a household of one (1) person was lower than the Ontario average while the percentage of visitors from a household of four (4) or more people was above the Ontario average.

In 2019 and 2021, Dryden had a greater percentage of transit visits from individuals in the age cohort of 0 to 14 compared to Ontario. Visitors from this age cohort accounted for approximately 18% of the total transient visits. In both years, around 28% of visitors belong to the 20-39 years old cohort. Compared to the benchmark, Dryden had a higher concentration of children, youth, young professional and middle-aged visitors.

When considering the age of children at home, 17% of Dryden's visitors have children aged 0 – 4 years old, 18% of visitors have children aged 5 – 9 years old, 18% of visitors have young teenagers aged 10 – 14 years old and another 17% of visitors have teenagers aged 15 - 19 years old. The results echo the findings mentioned above as almost one-third of Dryden's visitors belong to the age cohort of 20 – 39.

⁵ The primary household maintainer refers to the person in the household most responsible for paying the rent or mortgage, the taxes, the electricity, etc., for the dwelling.

Figure 7 - 2019 Dryden Transient Visitors Demographics - Population & Households

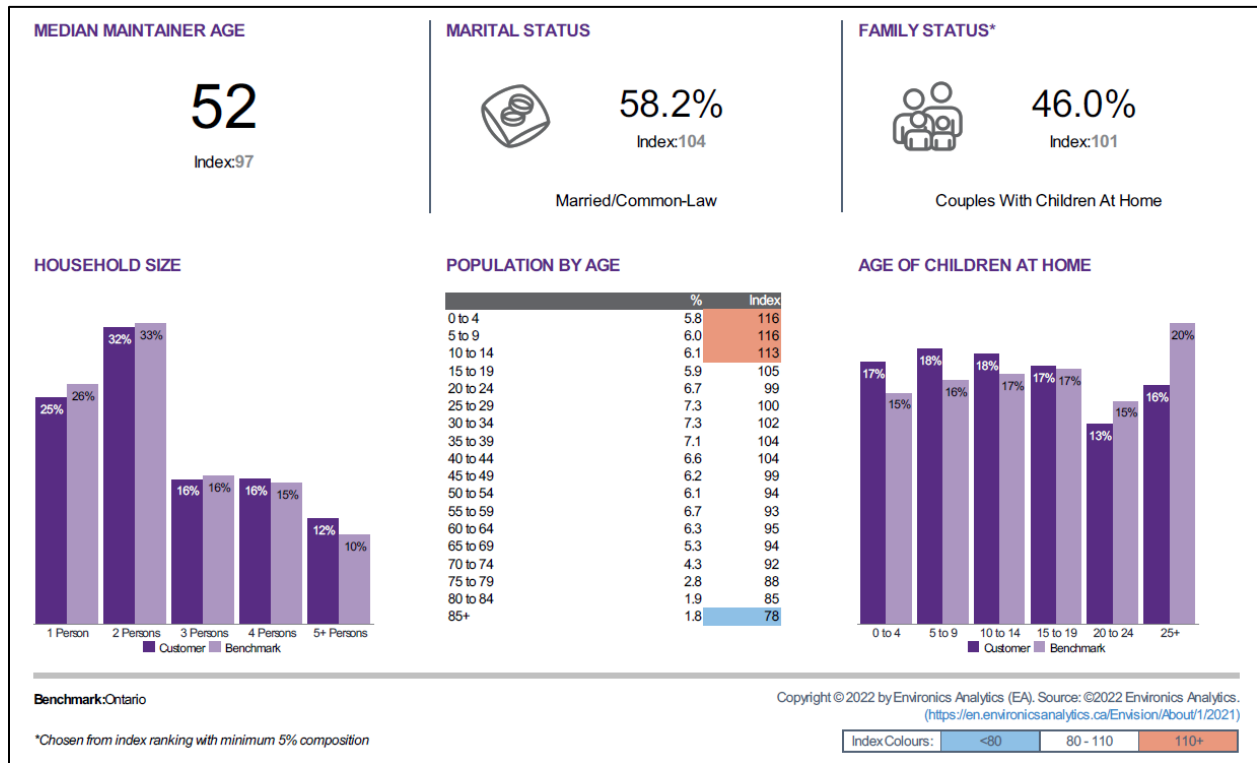
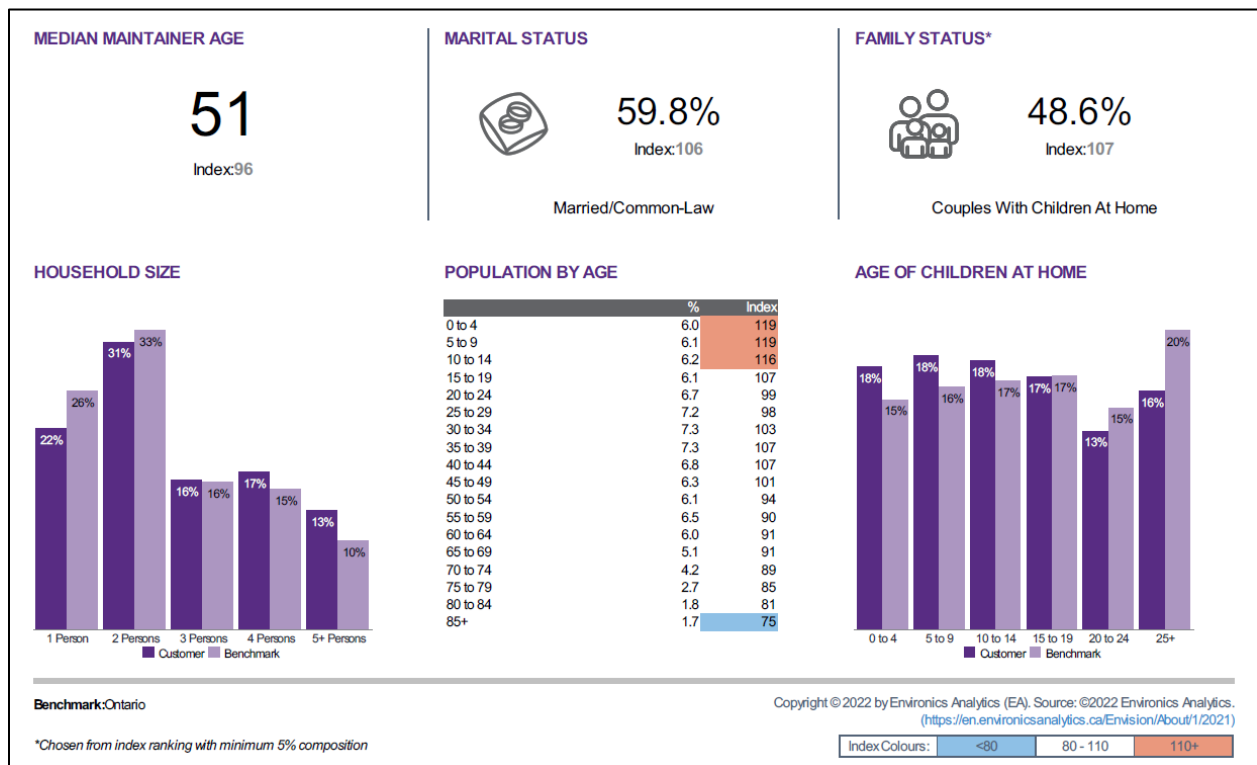


Figure 8 - 2021 Dryden Transient Visitors Demographics - Population & Households



1.2.2 Housing & Income

In 2019, 70.2% of Dryden's transient visitors owned one or more properties. 74.7% of those properties were houses and the remaining 23.9% were apartments. The average age of those dwellings is 4 – 9 years old, which is above the Ontario benchmark. In 2021, the percentage of Dryden visitors that owned one or more properties increased to 73.2%, of which 77.1 % of those properties were houses and 21.8% were apartments. The average age of housing remained the same to that of 2019.

In 2019, the average household income of Dryden's visitors was \$111,376. In 2021, the amount increased to \$114,743, representing an increase of 3%, which was similar to the inflation rate across those two (2) years. According to the 2016 Statistics Canada Census ⁶, Dryden residents had an average total household income of \$83,201 and after-tax household income of \$70,499. It can be seen that the transient visitors had a higher household income than Dryden residents.

Compared with the provincial benchmark in 2019 and 2021, Dryden had a higher concentration of visitors who had a household income greater than \$80,000. In 2019, 54% of Dryden's transient visitors had their household income fall within that range. In 2021, the percentage increased to 58%. For Dryden residents, only 44% of them have a household income greater than \$80,000 as of 2016 according to the Census.

When looking at the distribution of household income by \$20,000 intervals, many visitors were situated in the interval of \$20,000 to \$39,999 – 15% of visitors had their household income fall within this range in 2019 and 16% in 2021. This ratio matches with the ratio of Dryden residents – as of 2016, 16.9% of Dryden residents had a household income in between \$20,000 and \$39,999.

⁶ At the time of preparing this report, the 2021 Statistics Canada Census data had not yet been released.

Figure 9 - 2019 Dryden Transient Visitors Demographics - Housing & Income

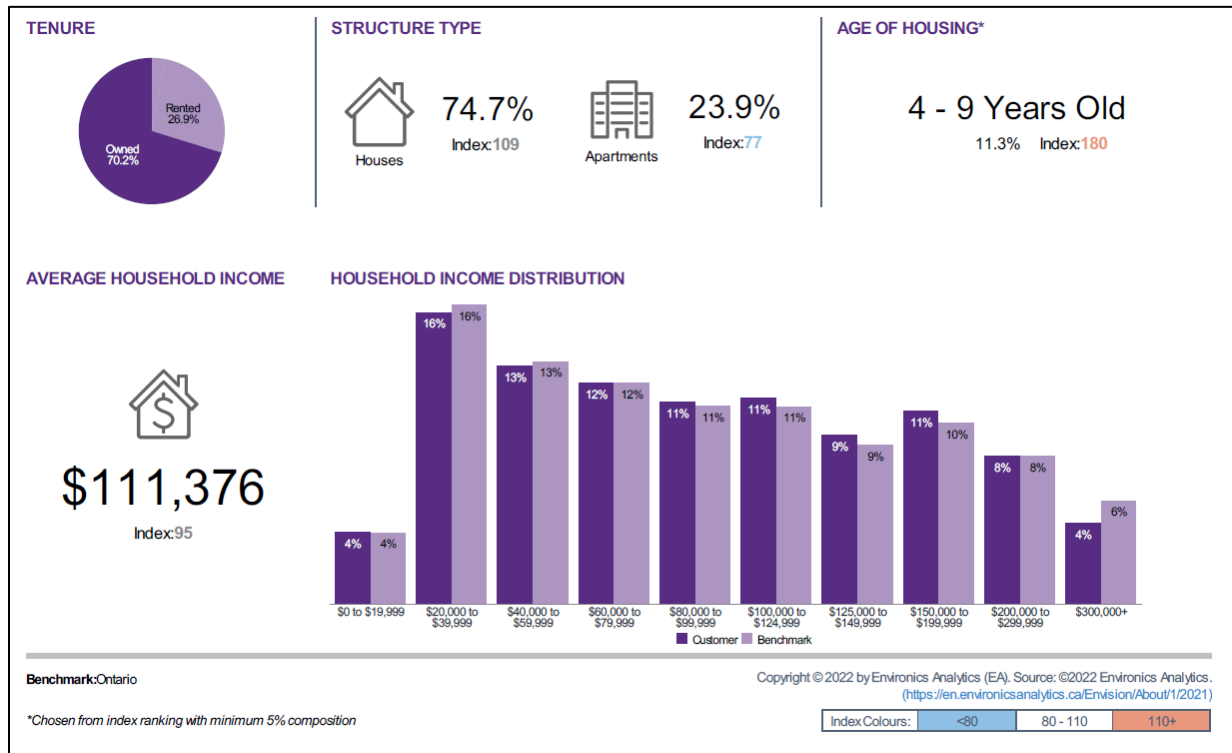
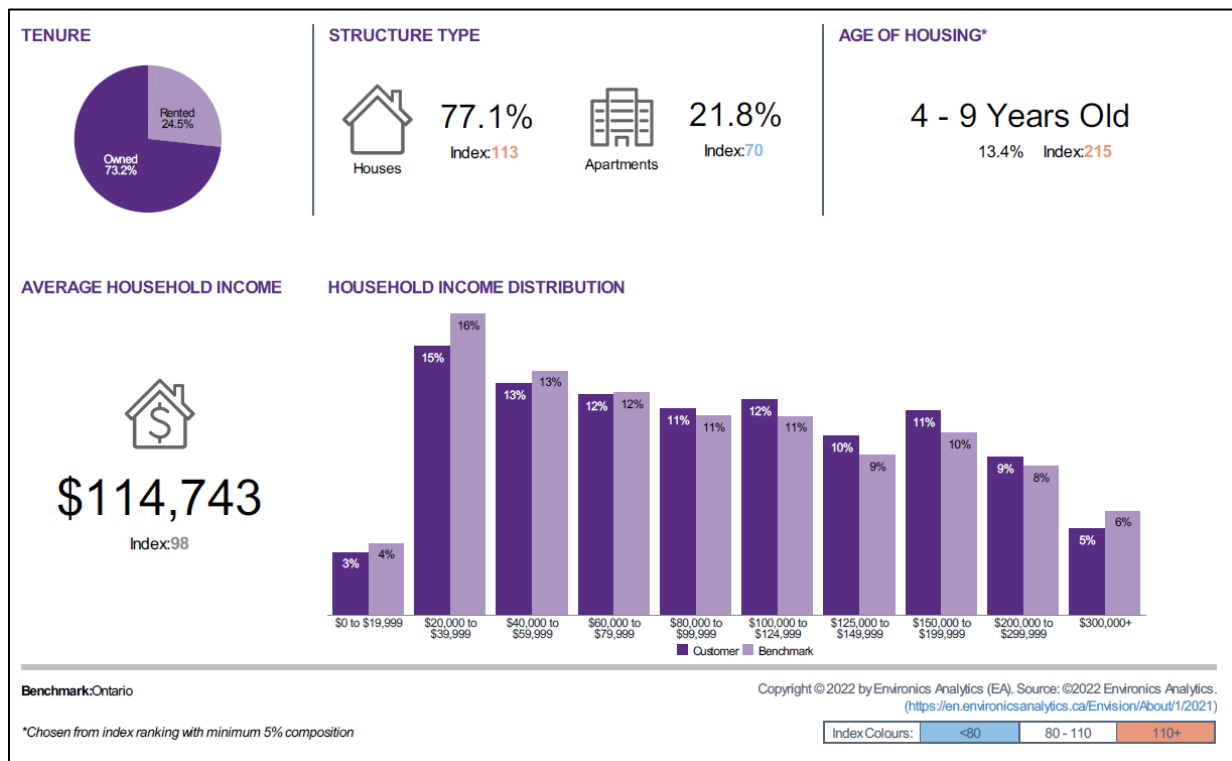


Figure 10 - 2021 Dryden Transient Visitors Demographics - Housing & Income



1.2.3 Education & Employment

In 2019, 25.7% of Dryden's transient visitors had a university degree. 17.8% of those visitors did not hold a certificate or diploma. 26.6% of those visitors held a High School certificate. In 2021, the percentage of Dryden's transient visitors who had a university degree increased to 27.7%. The percentage of visitors that held no certificate or diploma decreased to 16.9%. The percentage of visitors that had a High School certificate remained at 26.6%.

The labour force participation rate of Dryden's transient visitors was 65.4% in 2019 and 66.0% in 2021, which meant that approximately 66% of the visitors were working age and part of the labour force (15 to 64 years of age). The remaining 34% of were not in the labour force and neither employed nor unemployed. This cohort included students, homemakers, retired workers, seasonal workers in an 'off' season (who were not seeking employment), and individuals who could not work because of a long-term illness or disability.

For Dryden's transient visitors who were employed, most of them (13.9% in 2019 and 13.7% in 2021) have an occupation in the Sales and Service industry. In 2019, the top five occupations of visitors were Sales and Service (13.9%), Trades and Transport (9.4%), Business and Finance (9.4%), Social Science, Education and Government (8.9%), and Management (6.6%). In 2021, the top five occupations of visitors are identical to the 2019 results but with minimal changes to the percentage distribution - Sales and Service (13.7%), Trades and Transport (9.6%), Business and Finance (9.7%), Social Science, Education and Government (8.3%), and Management (6.8%).

Among Dryden's transient visitors, 35.3% and 36.0% of them travelled to work by car in 2019 and 2021, respectively. Only less than 5% of them travelled to work by public transit (4.2% in 2019 and 4.6% in 2021). The proportion of visitors who travelled to work by public transit was significantly lower compared to the Ontario benchmark (Index: 63). Since a large portion of Dryden's visitors have their common evening location in northern communities or small-scale communities, public transit may not have been available to them. When looking at the journey-to-work statistics of Dryden residents, it was found that 80.3% of them travelled to work by car as a driver and an additional 7% of Dryden residents travelled to work by car as a passenger. In total, close to 90% of Dryden residents commute to their workplace by car, this percentage is more than double compared to Dryden's transient visitors.

Figure 11 - 2019 Dryden Transient Visitors Demographics – Housing & Income

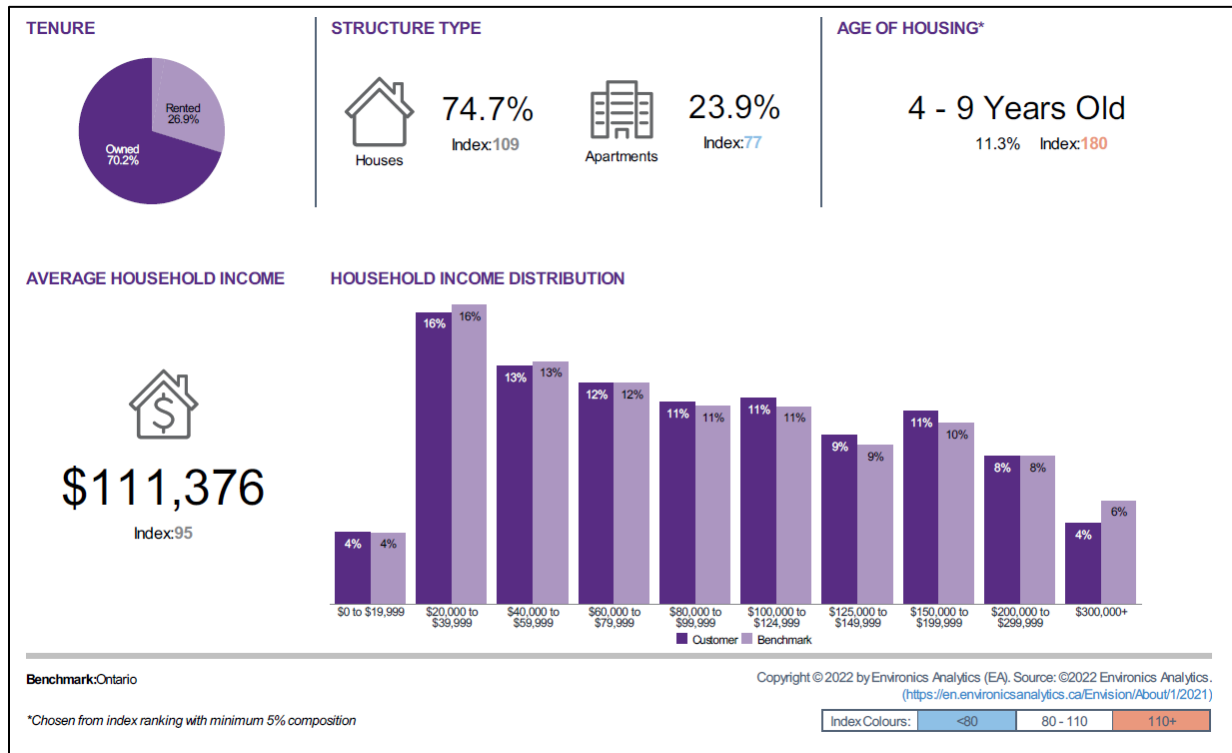
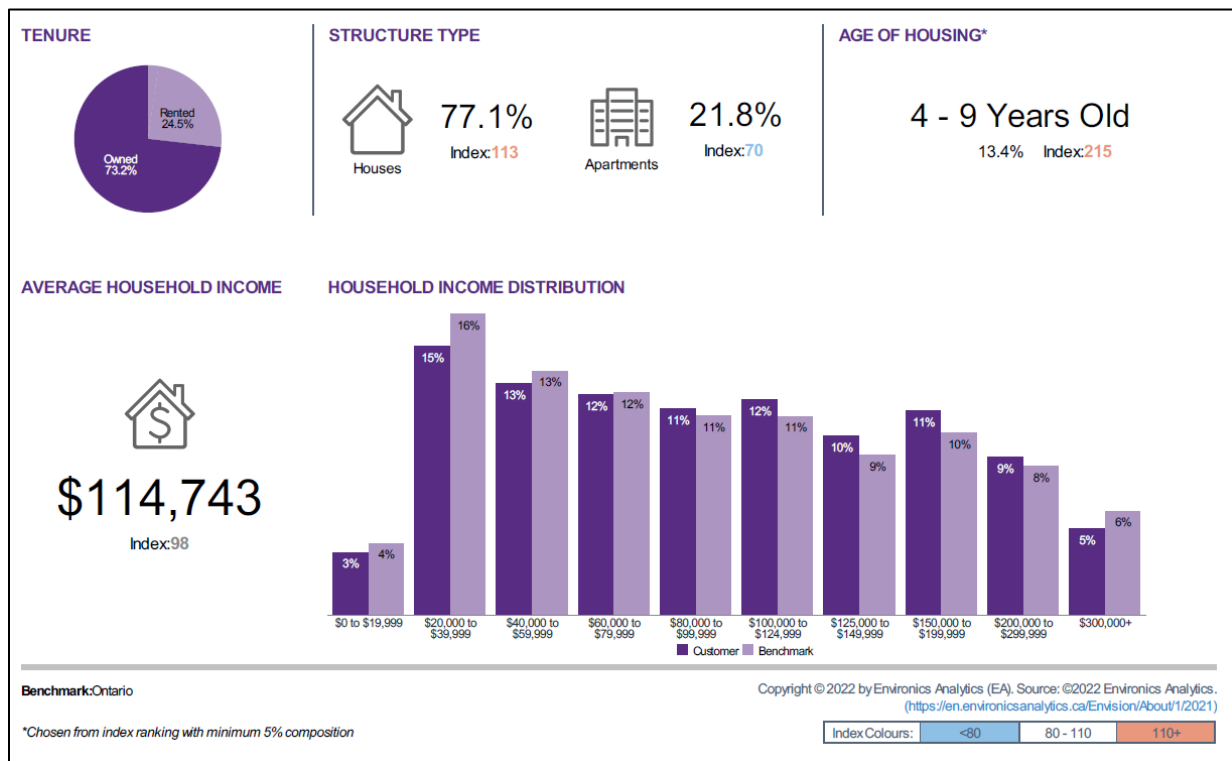


Figure 12 - 2021 Dryden Transient Visitors Demographics - Housing & Income



1.2.4 Diversity

In 2019, 13.8% of Dryden's transient visitors claimed Indigenous identity. In 2021, 10.2% of visitors were indigenous. While a component of this decline in visitors could be attributed to the COVID pandemic and related travel restrictions, the proportion of visitors in Dryden who identify as Indigenous is three (3) to four (4) times higher than the Ontario benchmark (Index: 474 in 2019, 353 in 2021). As for Dryden residents, 19.3% of them are indigenous according to the 2016 Census.

In 2019, 29.7% of Dryden's transient visitors were visible minorities. This percentage increased to 37.4% in 2021. Among the visible minority visitors, the top five (5) visible minority status in 2019 were South Asian (12.8%), Chinese (4.4%), Black (4.3%), Filipino (1.4%) and Arab (1.3%). In 2021, all of the top five (5) visible minority status' experienced increases in their relative percentages. In 2021, the top five (5) consisted of South Asian (17.8%), Chinese (5.8%), Black (4.8%), Filipino (1.5%) and Arab (1.6%). Among the top five visible minority groups, South Asian experienced the greatest increase in their relative percentages to all visible minority visitors.

As of the visitors' languages spoken at home, the majority of them (77.9%) spoke English. Other languages spoken at home included Panjabi, French, Indigenous languages, and Mandarin. In 2019, 2.2% of the visitors had no knowledge of English or French. In 2021, this percentage increased to 2.8%.

Immigrants accounted for a noticeable portion of Dryden's visitors. In 2019, 24.5% of Dryden's visitors were born outside of Canada and 5.7% of visitors had immigrated to Canada since 2017. In 2021, almost one-third (29.9%) of visitors were born outside of Canada and 7.8% of them had immigrated to Canada since 2017 to present.

Figure 13 - 2019 Dryden Transient Visitors Demographics – Diversity

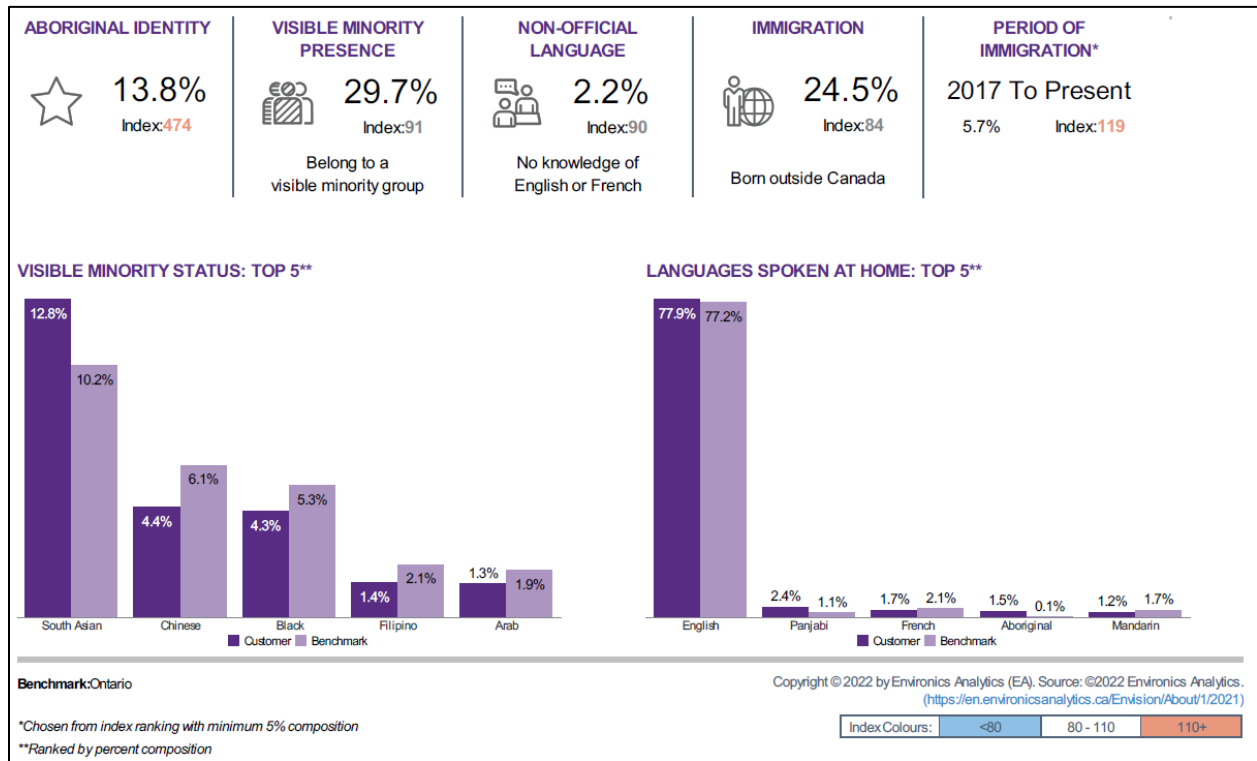
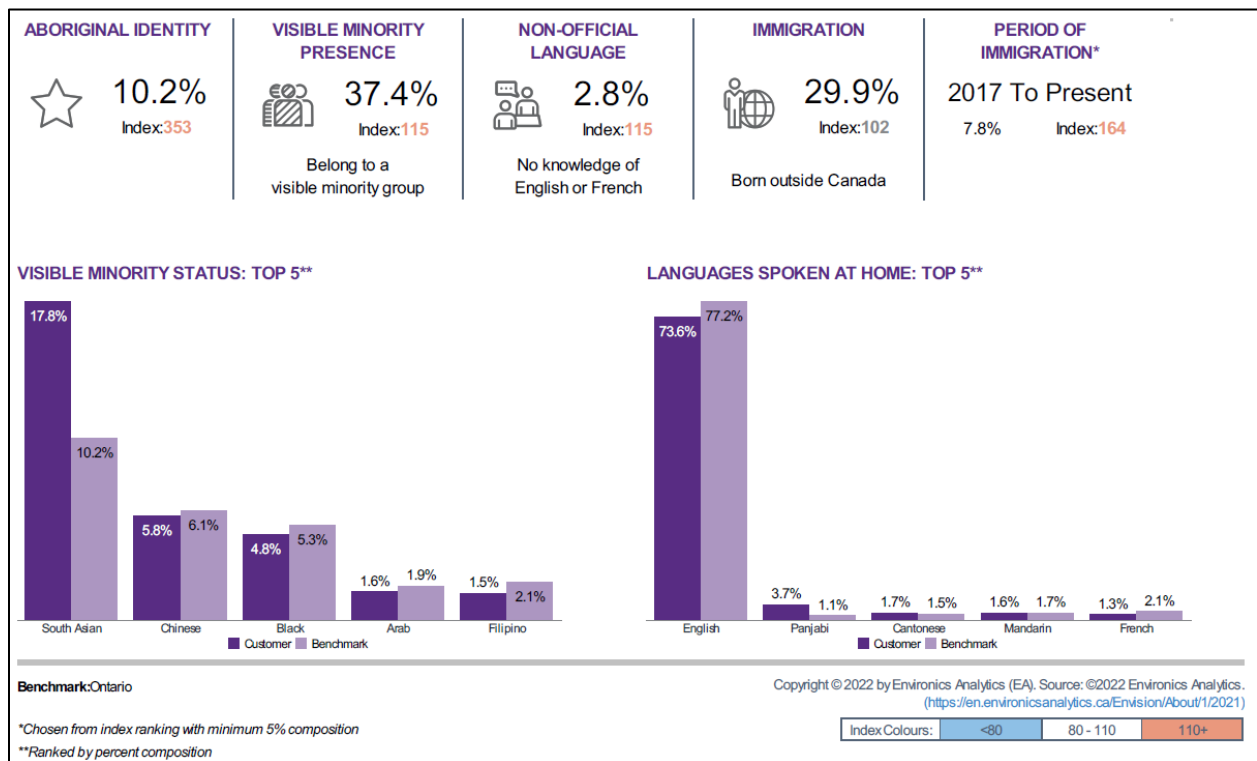


Figure 14 - 2021 Dryden Transient Visitors Demographics – Diversity



1.3 Retail-Commercial Supply Analysis

Business Counts data offers insights into the concentration and size of business establishments by industry sector. In this section, our team utilized data derived from Statistics Canada 2020 Canadian Business Counts to perform a series of analyses that specifically focuses on the Retail and Trade sector. The business count data was sourced from the Canadian Business Register Repository. The business count data is presented in two (2) categories – Without Employees⁷ and With Employees.

1.3.1 Quantitative Review of Commercial and Retail Business Inventory

1.3.1.1 *Commercial Business Count*

The business count data presented below reveals the number of businesses (with and without employees) in the City of Dryden as of December 2020. Data was derived from the Statistics Canada, Canadian Business Counts Program supported by engagements with stakeholders and City of Dryden staff

1.3.1.1.1 *Retail Trade Industry*

The largest sub-industry under Retail Trade Industry (NAICS 44-45) is Gasoline Stations. In Dryden, there were 17 gasoline stations⁸, 11 of which had employees. Clothing and Clothing Accessories Stores (NAICS 448) has the second-largest business count (13 businesses, four (4) without employees and 9 with employees).

⁷ The “Without Employees” category includes the Self-Employed (i.e., those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners)

⁸ NAICS 447 include not only automotive gasoline station but also aviation fuel retail (except at airport), cardlock stations (except petroleum tank farms), marine service station, automotive service station, and truck stops.

Table 4 - Dryden Retail Trade Industry Business Count, December 2020

NAICS Industry	Number of Business Without Employees	Number of Business with Employees	Total
441 - Motor vehicle and parts dealers	1	7	8
442 - Furniture and home furnishings stores	2	2	4
443 - Electronics and appliance stores	0	2	2
444 - Building material and garden equipment and supplies dealers	0	3	3
445 - Food and beverage stores	1	8	9
446 - Health and personal care stores	1	7	8
447 - Gasoline stations	6	11	17
448 - Clothing and clothing accessories stores	4	9	13
451 - Sporting goods, hobby, book and music stores	1	2	3
452 - General merchandise stores	0	5	5
453 - Miscellaneous store retailers	4	6	10
454 - Non-store retailers	1	1	2
Total	21	63	84

To better understand the relative size of those businesses presented above, Appendix 1 – Classification of Dryden’s Retail Businesses by Employee Size, further delves into these Dryden-based business at the 6-digit level and organizes them by number of employees.

1.3.2 Qualitative Review of Commercial and Retail Businesses Inventory

The Business Count Analysis in section 1.3.1 above presents the number of retail trade businesses (starting with two-digit NAICS 44 and 45) and organized the data by size of establishment based on the number of employees. The Business Gap Analysis uses a more qualitative approach to understanding the data for the purposes of identifying local retail and commercial business gaps.

Data to support the Business Gap Analysis was obtained from multiple sources including, the City of Dryden Online Business Directory⁹, the Dryden Chamber of Commerce Business Directory¹⁰, individual lists provided by City of Dryden Staff, the stakeholder engagement process and by Google Maps. Businesses, such as department stores which are known to have multiple departments (such as men’s, women’s and children’s clothing, electronics, groceries, etc.) were listed in more than one (1) category. While the majority of businesses were associated with a six-digit NAICS code, some businesses were grouped by either four (4) or five (5) digit NAICS.

Table 5 presents a list of the businesses which are currently located within the City of Dryden.

⁹ <https://directory.dryden.ca/>

¹⁰ <https://drydenchamber.ca/business-directory/view/all/>

Table 5 – Dryden’s Retail Businesses Organized by NAICS

NAICS	Description	Dryden Business
441110 - New car dealers	Establishments primarily engaged in retailing new automobiles, sport utility vehicles, and light-duty trucks and vans, including mini-vans, to final consumers or to automobile lessors. These establishments also typically retail used cars, replacement parts and accessories, and provide repair services. Click here for examples.	Dryden GM McKinstry Chrysler Dingwall Ford Dryden
441120 - Used car dealers	Establishments primarily engaged in retailing used automobiles, sport utility vehicles, and light-duty trucks and vans, including mini-vans. Click here for examples.	Dingwall Ford Dryden Dryden GM Northwestern Auto Sales McKinstry Chrysler
441210 - Recreational vehicle dealers	Establishments primarily engaged in retailing new and used recreational vehicles (RVs), such as motor homes, recreational trailers and campers. These establishments also typically retail replacement parts and accessories and provide repair services. Click here for examples.	n/a
441220 - Motorcycle, boat and other motor vehicle dealers	Establishments primarily engaged in retailing new and used motorcycles, watercraft and other vehicles, such as snowmobiles, off-road all-terrain vehicles, utility trailers, and aircraft. These establishments also typically retail replacement parts and accessories, and provide repair services. Click here for examples.	Dingwall Ford – Boats & Quads Dryden Powersports St Aubin Saw Shop
441310 - Automotive parts and accessories stores	Establishments primarily engaged in retailing new, rebuilt and used automotive parts and accessories; both retailing automotive parts and accessories and repairing automobiles; and retailing automotive accessories that generally require installation. Click here for examples.	Canadian Tire D & S Auto Glass Fountain Tire Dryden Dingwall Ford Downtown Auto Pro Dryden GM McKinstry Chrysler NAPA Peterbilt Solomon & Sons Ltd. TJ’s Auto

		TLC Automotive Walmart
441320 - Tire dealers	Establishments primarily engaged in retailing tires and tubes. These establishments also typically provide complementary services, such as tire mounting and wheel balancing and aligning. Click here for examples.	Canadian Tire Fountain Tire Dryden Dingwall Ford Dryden GM KK Penner McKinstry Chrysler
442110 - Furniture stores	Establishments primarily engaged in retailing new household and office furniture. Click here for examples.	Canadian Tire Dufresne Furniture & Appliance Gould's Brandsource Home Furnishings Home Hardware Northwest Goods Rona Wilson's Business Solutions Walmart
442210 - Floor covering stores	Establishments primarily engaged in retailing new floor coverings, such as rugs and carpets, vinyl floor coverings, wood floor coverings, and floor tiles, except ceramic. These establishments also typically provide installation and repair services. Click here for examples.	Dryden Discount Carpet Sales Guenther's Flooring Home Hardware Rona
442291 - Window treatment stores	Establishments primarily engaged in retailing ready-made and custom draperies, blinds and shades. Click here for examples.	Blinds by Molina
442292 - Print and picture frame stores	Establishments primarily engaged in retailing posters, prints and ready-made frames, and in custom framing, mounting and laminating. Click here for examples.	MacPrint Shoppers Drug Mart Walmart
442298 - All other home furnishings stores	Establishments, not classified to any other Canadian industry, primarily engaged in retailing new home furnishings. Click here for examples.	Forest+Fern Kano Reid Northwest Goods Second Chance Treasures (second hand)

443143 - Appliance, television and other electronics stores	Establishments primarily engaged in retailing new household appliances, home audio and video equipment, and other electronic products. Click here for examples.	Canadian Tire Dufresne Furniture & Appliance Gould's BrandSource Home Furnishings Home Hardware Marnics Mobile Oshtugon Rona Walmart
443144 - Computer and software stores	Establishments primarily engaged in retailing new computers, computer peripherals, pre-packaged software, game software and related products. Click here for examples.	Marnics Mobile Oshtugon Wilson's Business Solutions
443145 - Camera and photographic supplies stores	Establishments primarily engaged in retailing new cameras, photographic equipment and photographic supplies. Click here for examples.	Oshtugon Shoppers Drug Mart Walmart
443146 - Audio and video recordings stores	Establishments primarily engaged in retailing new audio and video recordings in any format or medium. Click here for examples.	Walmart
444110 - Home centres	Establishments primarily engaged in retailing a general line of home repair and improvement materials and supplies, such as lumber, doors and windows, plumbing goods, electrical goods, floor coverings, tools, houseware, hardware, paint and wallpaper, and lawn and garden equipment and supplies. The merchandise lines are normally arranged in separate sections. Click here for examples.	Canadian Tire EECOL Electric EMCO Western Supply Home Hardware Intercity Industrial Supply MGM Electric Rona Walmart Wolseley Plumbing
444120 - Paint and wallpaper stores	Establishments primarily engaged in retailing paint, wallpaper and related supplies. Click here for examples.	Canadian Tire Home Hardware Rona Walmart

444130 - Hardware stores	Establishments, known as hardware stores, primarily engaged in retailing a general line of basic hardware items, such as tools and builders' hardware. Click here for examples.	Canadian Tire EECOL Electric Emcon Services Home Hardware Intercity Industrial Supply Rona Wolseley Plumbing
444190 - Other building material dealers	Establishments primarily engaged in retailing specialized lines of building materials. Click here for examples.	Northwestern Auto Sales Richard's Building Supply
444210 - Outdoor power equipment stores	Establishments primarily engaged in retailing outdoor power equipment. Click here for examples.	Canadian Tire Dryden Powersports Home Hardware Rona St Aubin Saw Shop Walmart
444220 - Nursery stores and garden centres	Establishments primarily engaged in retailing nursery and garden products, such as trees, shrubs, plants, seeds, bulbs and sod, that are predominantly grown elsewhere. Click here for examples.	Canadian Tire Extrafoods Home Hardware PRT Dryden Nursery Rona Schmidt Greenhouses Tamarac Nurseries Walmart
445110 - Supermarkets and other grocery (except convenience) stores	Establishments, known as supermarkets and grocery stores, primarily engaged in retailing a general line of food, such as canned, dry and frozen foods; fresh fruits and vegetables; fresh and prepared meats, fish, poultry, dairy products, baked products and snack foods. Click here for examples.	AgriTech North Extra Foods M&M Food Market Safeway Shoppers Drug Mart Walmart

445120 - Convenience stores	Establishments, known as convenience stores, primarily engaged in retailing a limited line of convenience items that generally includes milk, bread, soft drinks, snacks, tobacco products, newspapers and magazines. Click here for examples.	7-Eleven Co-op Gas Bar Corner Store Dryden Petro-Pass Dryden Variety HUSKY/ESSO (multiple locations) Mobile Gas Bar Safeway Gas Bar
445210 - Meat markets	Establishments primarily engaged in retailing fresh, frozen, or cured meats and poultry. Click here for examples.	807 Food Co-op Cloverbelt Country Meats (Oxdrift abattoir) Extra Foods Huber's Bavarian Meats M&M Meats Mikewell Farms Safeway Walmart
445220 - Fish and seafood markets	Establishments primarily engaged in retailing fresh, frozen, or cured fish and seafood products. Click here for examples.	Extra Foods Safeway Walmart
445230 - Fruit and vegetable markets	Establishments primarily engaged in retailing fresh fruits and vegetables. Click here for examples.	807 Food Co-op Agritech North Cloverbelt Country Farmers Market (seasonal)
445291 - Baked goods stores	Establishments primarily engaged in retailing baked goods not baked on the premises, and not for immediate consumption. Click here for examples.	Bulk Zone Kano Reid Safeway Walmart
445292 - Confectionery and nut stores	Establishments primarily engaged in retailing candy and other confections, nuts and popcorn. Click here for examples.	Bulk Zone Extra Foods Safeway Shoppers Drug Mart Walmart

445299 - All other specialty food stores	Establishments, not classified to any other Canadian industry, primarily engaged in retailing specialty foods. Click here for examples.	Awakened Roots Beezer's Honey Fediuk's Downhome Baking Parr's Jars
445310 - Beer, wine and liquor stores	Establishments primarily engaged in retailing packaged alcoholic beverages, such as beer, wine and liquor. Click here for examples.	Beer Store LCBO
446110 - Pharmacies and drug stores	Establishments, known as pharmacies and drug stores, primarily engaged in retailing prescription or non-prescription drugs and medicines. Click here for examples.	IDA Pharmasave Dryden Shoppers Drug Mart Walmart
446120 - Cosmetics, beauty supplies and perfume stores	Establishments primarily engaged in retailing cosmetics, perfumes, toiletries and personal grooming products. Click here for examples.	Extra Foods Kano Reid Northwest Goods Pharmasave Shoppers Drug Mart Walmart
446130 - Optical goods stores	Establishments primarily engaged in retailing and fitting prescription eyeglasses and contact lenses. Click here for examples.	Dr. Lockyer Dr. Turcotte
446191 - Food (health) supplement stores	Establishments primarily engaged in retailing food supplement products, such as vitamins, nutrition supplements and body enhancing supplements. Click here for examples.	Awakened Roots Bulk Zone Safeway Shoppers Drug Mart Walmart
446199 - All other health and personal care stores	Establishments, not classified to any other Canadian industry, primarily engaged in retailing specialized lines of health and personal care merchandise. Click here for examples.	Northwestern Ontario Medical Superior Home Health Care Wellwise by Shoppers
447110 - Gasoline stations with convenience stores	Establishments primarily engaged in retailing automotive fuels combined with the retail sale of a limited line of merchandise, such as milk, bread, soft drinks and snacks in a convenience store setting. Click here for examples.	Co-op Gas Bar Dryden Keystop (Dryden Cardlock) Dryden Petro Pass Mobil Petro-Pass Truck Stop Husky/Esso (multiple locations) Safeway Gas Bar

448110 - Men's clothing stores	Establishments primarily engaged in retailing a general line of new, men's and boys', ready-to-wear clothing. Click here for examples.	Canadian Tire Casey's Clothes Closet Casually Hip D-Town Dryden Powersports Eagles Landing Golf Course Little Mod Nest Mark's McTaggarts Northwest Goods Walmart Warehouse One
448120 - Women's clothing stores	Establishments primarily engaged in retailing a general line of new, women's, ready-to-wear clothing. Click here for example.	Canadian Tire Casey's Clothes Closet Casually Hip D-Town Dryden Powersports Eagles Landing Golf Course Ella Lynn's Little Mod Nest Mark's McTaggarts Michelle's Top Drawer Northwest Goods Walmart Warehouse One
448130 - Children's and infants' clothing stores	Establishments primarily engaged in retailing a general line of new, children's and infants', ready-to-wear clothing. Click here for examples.	Extrafoods (Joe Fresh) Little Mod Nest McTaggarts Michelle's Top Drawer Walmart
448140 - Family clothing stores	Establishments primarily engaged in retailing a general line of new, ready-to-wear clothing for men, women and children, without specializing in sales for an individual gender or age group. Click here for examples.	Extrafoods (Joe Fresh) Little Mod Nest McTaggarts Walmart

448150 - Clothing accessories stores	Establishments primarily engaged in retailing a single or general line of new clothing accessories. Click here for examples.	Kano Reid Northwest Goods
448199 - All other clothing stores	Establishments, not classified to any other Canadian industry, primarily engaged in retailing specialized lines of new clothing. Click here for details.	Canadian Tire Clark's Dryden Mission Dryden Powersports Mallons QSL Tackle --> Queen St. Laundry Salvation Army Signature Signs and Stitchery
448210 - Shoe stores	Establishments primarily engaged in retailing all types of new footwear. Click here for examples.	Canadian Tire Casey's Clothes Closet Casually Hip D-Town Eagles Landing Golf Course Mark's McTaggarts Walmart
448310 - Jewellery stores	Establishments primarily engaged in retailing jewellery, sterling and plated silverware, and watches and clocks. Click here for examples.	Dryden Coin and Jewelry Shop Northwest Goods Ella Lynn's Flower Forest Forest+Fern Kano Reid McTaggarts Pharmasave Shoppers Drug Mart Walmart
448320 - Luggage and leather goods stores	Establishments primarily engaged in retailing luggage, briefcases, trunks and related products, and establishments engaged in retailing a line of leather items. Click here for details.	Canadian Tire Walmart
451111 - Golf equipment and supplies specialty stores	Establishments primarily engaged in retailing new golf equipment and supplies. Click here for details.	Anderson's Golf Course Canadian Tire Eagles Landing Golf Course Walmart

451112 - Ski equipment and supplies specialty stores	Establishments primarily engaged in retailing new ski equipment and supplies. Click here for details.	n/a
451113 - Cycling equipment and supplies specialty stores	Establishments primarily engaged in retailing new cycling equipment and supplies. Click here for details.	Canadian Tire Walmart
451119 - All other sporting goods stores	Establishments, not classified to any other Canadian industry, primarily engaged in retailing new sporting goods. Click here for examples.	Canadian Tire Clark's Casualty Hip D-Town Dryden Powersports The Palace Queen St Laundry & Tackle Taggs Source for Sports/McTaggarts Walmart
451120 - Hobby, toy and game stores	Establishments primarily engaged in retailing new toys, games, and hobby and craft supplies. Click here for examples.	Kano Reid Pharmasave
451130 - Sewing, needlework and piece goods stores	Establishments primarily engaged in retailing new sewing supplies, fabrics, patterns, yarns and other needlework accessories. Click here for examples.	Al's Fabrics & Custom Sewing The Quilting Trunk Sew Many Things Walmart
451140 - Musical instrument and supplies stores	Establishments primarily engaged in retailing new musical instruments, sheet music and related supplies. Click here for examples.	Oshtugon
451310 - Book stores and news dealers	Establishments primarily engaged in retailing new books, newspapers, magazines and other periodicals. Click here for examples.	Novel Ideas Shoppers Drug Mart Walmart
452110 - Department stores	Establishments primarily engaged in retailing a wide range of products, with each merchandise line constituting a separate department within the store. Click here for examples.	Canadian Tire Home Hardware Rona Walmart
452910 - Warehouse clubs	Establishments primarily engaged in retailing a general line of grocery items typically by multi-unit cases and/or in large formats, in combination with a general line of non-grocery items; and typically charging a membership fee. Click here for examples.	n/a

452991 - Home and auto supplies stores	Establishments primarily engaged in retailing a general line of auto supplies along with a general line of home supplies. Click here for supplies.	Canadian Tire Walmart
452999 - All other miscellaneous general merchandise stores	Establishments, not classified to any other Canadian industry, primarily engaged in retailing a general line of new merchandise. Click here for examples.	Bulk Zone Downtown Dollar Highway Dollar & More Northwest Goods
453110 - Florists	Establishments primarily engaged in retailing cut flowers, floral arrangements, and potted plants grown elsewhere. These establishments typically prepare the arrangements they sell. Click here for examples.	The Flower Forest Safeway
453210 - Office supplies and stationery stores	Establishments primarily engaged in retailing office supplies or a combination of office supplies, equipment and furniture. Click here for examples.	TBXI Walmart Wilson's Business Solutions
453220 - Gift, novelty and souvenir stores	Establishments primarily engaged in retailing new gifts, novelty merchandise, souvenirs, greeting cards, seasonal and holiday decorations, and curios. Click here for examples.	The Flower Forest Kano Reid Naked North Art Gallery Pharmasave
453310 - Used merchandise stores	Establishments primarily engaged in retailing used merchandise. Click here for examples.	Boondocks Rustic Revival – Antiques Dryden Mission Hand Me Up Scale Family Closet Kim's Trash 2 Treasures Salvation Army Second Chance Treasures
453910 - Pet and pet supplies stores	Establishments primarily engaged in retailing pets, pet food and pet supplies. Click here for examples.	Canadian Tire The Pet Store Walmart
453920 - Art dealers	Establishments primarily engaged in retailing original and limited edition art works. Click here for examples.	Ann Siciliano Art Studio Naked North Art Gallery
453930 - Mobile home dealers	Establishments primarily engaged in retailing new and used mobile homes, parts and equipment. Click here for examples.	n/a

453992 - Beer and wine-making supplies stores	Establishments primarily engaged in retailing beer and wine-making supplies and equipment. Click here for examples.	The Golden Nectar
453993 - Cannabis stores	Establishments primarily engaged in retailing cannabis and cannabis products, including on-line sales. Click here for examples.	Ideal Buds Cannabis Store The Toke House
453999 - All other miscellaneous store retailers (except beer and wine-making supplies stores)	Establishments, not classified to any other Canadian industry, primarily engaged in retailing specialized lines of merchandise. Click here for examples.	First Choice Janitorial (Beachcomber Dealer)
454210 - Vending machine operators	Establishments primarily engaged in owning, stocking and servicing vending machines designed to retail merchandise. Click here for examples.	Old Dutch
454311 - Heating oil dealers	Establishments primarily engaged in retailing heating oil via direct selling to the final consumer including both households and commercial businesses. Click here for examples.	Mastrangelo Fuels Morgan Fuels Superior Propane
454312 - Liquefied petroleum gas (bottled gas) dealers	Establishments primarily engaged in retailing liquefied petroleum gas (LPG) gas via direct selling. Click here for examples.	Canadian Tire FCL / Co-op Linde Safeway Gas Bar Superior Propane
454319 - Other fuel dealers	Establishments primarily engaged in retailing fuels (except heating oil and liquefied petroleum gas) via direct selling. Click here for examples.	Mastrangelo Fuels Morgan Fuels

Table 6 – Dryden’s Food and Beverage Businesses Organized by NAICS

NAICS	Description	Dryden Business
722410 - Drinking places (alcoholic beverages)	Establishments, known as bars, taverns or drinking places, primarily engaged in preparing and serving alcoholic beverages for immediate consumption. Click here for examples.	B&B Roadhouse Bar and Grill Ho Ho’s Hong Kong House Masala Restaurant Mulligan’s Restaurant Pizza Hut The PI The Riverview Lodge Timber Lanes
722511 - Full-service restaurants	Establishments primarily engaged in providing food services to patrons who order and are served while seated and pay after eating. Click here for examples.	B&B Roadhouse Bar and Grill Ho Ho’s Hong Kong House Masala Restaurant Mulligan’s Restaurant Pizza Hut Springwater Café The PI The Riverview Lodge Timber Lanes Twin Towers

722512 - Limited-service eating places	Establishments primarily engaged in providing food services to patrons who order or select items at a counter, food bar or cafeteria line (or order by telephone) and pay before eating. Food and drink are picked up for consumption on the premises or for take-out, or delivered to the customer's location. Click here for examples.	7-11 A&W The Chip Box Crooked Arrow Catering Dairy Queen Domino's Pizza Husky Restaurant (Truck Stop) Just G's Kano Reid Kathy's Catering KFC McDonald's Subway Tim Hortons Your Choice Catering
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Table 7 – Dryden's Accommodation Businesses Organized by NAICS

NAICS	Description	Dryden Business
72111 - Hotels (except casino hotels) and motels	Establishments primarily engaged in providing short-term lodging in facilities known as hotels, motor hotels, resort hotels and motels. These establishments may offer food and beverage services, recreational services, conference rooms and convention services, laundry services, parking and other services. Click here for examples.	Best Western Plus Dryden Hotel & Conference Centre Chalet Inn Motel & Restaurant Comfort Inn Evening Star Motel Hide Away Holiday Inn Express Dryden Kowality Motor Inn Patricia Inn The Riverview Lodge Timberland Motel Town & Country Motel

72121 - Recreational vehicle (RV) parks and recreational camps	Establishments primarily engaged in operating recreational vehicle parks and campgrounds, hunting and fishing camps, and various types of vacation and adventure camps. These establishments cater to outdoor enthusiasts and are characterized by the type of accommodation and by the nature and the range of recreational facilities and activities provided to their clients. Click here for examples.	Aaron Park Birchland Trailer Park Bonny Bay Camp & RV Park Indian Point Camp Nature's Inn Northwestern Tent & RV
721212 - Hunting and fishing camps	Establishments primarily engaged in operating hunting and fishing camps. Click here for examples.	Bonny Bay Camp & RV Park Indian Point Camp

Table 8 – Other Dryden-Based Service-Commercial Businesses Organized by NAICS

NAICS	Description	Dryden Business
111422 - Floriculture production	Establishments primarily engaged in growing, under cover or in open fields, floriculture products and propagating materials. Click here for examples.	Schmidt's Greenhouse Tamarac Nurseries
112910 - Apiculture	Establishments primarily engaged in raising bees, collecting and gathering honey, and performing other apiculture activities. Click here for examples.	Beezer's Honey (Bee Keeping)
115310 - Support activities for forestry	Establishments primarily engaged in performing particular support activities, related to harvesting timber. Click here for examples.	Dryden Forest Management Company
236110 - Residential building construction	Establishments primarily engaged in the construction or remodelling and renovation of single-family and multi-family residential buildings. Click here for examples.	Dale Woods Contracting Horst Lang Construction Lakeview Contracting McKay Construction Renew Construction Rostek Contracting Service Master

NAICS	Description	Dryden Business
238140 - Masonry contractors	Establishments primarily engaged in masonry work, stone setting, brick laying, and other stone work. The work performed may include new work, additions, alterations, maintenance, and repairs. Click here for examples.	Fedorchuk Masonry Jason Anderson Concrete
238210 - Electrical contractors and other wiring installation contractors	Establishments primarily engaged in installing or servicing electrical wiring and equipment. Click here for examples.	Brisson Electric Feduik Electric Hoover Electric KPE Electrical Kusnick Electric M.C. Lough Electric Inc. RTL Electric REZ Electric
238220 - Plumbing, heating and air-conditioning contractors	Establishments primarily engaged in installing or servicing plumbing, heating, and air-conditioning equipment. Contractors in this industry may provide both parts and labour when performing work. The work performed may include new work, additions, alterations, maintenance, and repairs. Click here for examples.	Copperite Plumbing and Heating Energy Tech Services Fediuk's Plumbing & Heating Graf's Plumbing Lakeland Plumbing & Heating Lyle's Plumbing Superior Plumbing + Heating
238320 - Painting and wall covering contractors	Establishments primarily engaged in painting, paperhanging and decorating in buildings and painting heavy (engineering) structures. The type of work performed can be new work, additions, alterations, maintenance, and repairs. Click here for examples.	iPaint
238340 - Tile and terrazzo contractors	Establishments primarily engaged in setting and installing ceramic tile, stone (interior only), and mosaic and/or mixing marble particles and cement to make terrazzo at the job site. The work performed may include new work, additions, alterations, maintenance, and repairs. Click here for examples.	Northern Moonworks

NAICS	Description	Dryden Business
238390 - Other building finishing contractors	Establishments, not classified to any other Canadian industry, primarily engaged in building finishing trade work. The work performed may include new work, additions, alterations, or maintenance and repairs. Click here for details.	Sunset Granite
311824 - Flour mixes, dough, and pasta manufacturing from purchased flour	Establishments primarily engaged in manufacturing either dry pasta, prepared flour mixes or dough from purchased flour. Click here for examples.	The Pure Blend
312110 - Soft drink and ice manufacturing	Establishments primarily engaged in manufacturing soft drinks, ice or bottled water. Water-bottling establishments in this industry purify the water before bottling it. Click here for examples.	Anderson's Bottled Water
312120 - Breweries	Establishments primarily engaged in brewing beer, ale, malt liquors and non-alcoholic beer. Click here for examples.	n/a
327110 - Pottery, ceramics and plumbing fixture manufacturing	Establishments primarily engaged in shaping, moulding, glazing and firing pottery, ceramics and plumbing fixtures. Click here for examples.	Johann Timber Co. Keifer Floreal Pottery
327320 - Ready-mix concrete manufacturing	Establishments primarily engaged in mixing together water, cement, sand, gravel or crushed stone to make concrete, and delivering it to a purchaser in a plastic or unhardened state. Click here for examples.	Miller Northwest Ltd. Reynolds Concrete
332710 - Machine shops	Establishments primarily engaged in operating machine tools, such as lathes (including computer numerically controlled), automatic screw machines, and machines for boring, grinding, milling and otherwise working metal, and machines for additive manufacturing to produce machine parts and equipment, other than complete machines, for the trade. Click here for examples.	Basic Machining Solomon & Son Ltd

NAICS	Description	Dryden Business
333990 - All other general-purpose machinery manufacturing	Establishments, not classified to any other Canadian industry, primarily engaged in manufacturing machinery that is not designed for use in any specific industry. Click here for examples.	D J's Propeller & Skeg Repair & Aluminum Welding
335990 -All other electrical equipment and component manufacturing	Establishments, not classified to any other Canadian industry, primarily engaged in manufacturing electrical equipment and components. Click here for examples.	Ivy Charging Station Tesla Superchargers
337110 - Wood kitchen cabinet and counter top manufacturing	Establishments primarily engaged in manufacturing wood kitchen cabinets, bathroom vanities, and counters, designed for permanent installation. Click here for examples.	Home Hardware Northwest Finishing Custom Cabinets And Millwork Rona Sunset Granite
337123 - Other wood household furniture manufacturing	Establishments primarily engaged in manufacturing wood furniture designed for household use, except upholstered. Such furniture may be used in buildings other than private dwellings, for example in hotel rooms. Click here for examples.	True North Woodworks
339910 - Jewellery and silverware manufacturing	Establishments primarily engaged in manufacturing, engraving, chasing or etching jewellery, novelties or precious metal flatware; stamping coins; cutting, slabbing, tumbling, carving, engraving, polishing or faceting precious or semiprecious stones; recutting, repolishing and setting gem stones; or drilling, sawing, and peeling cultured and costume pearls. Click here for examples.	Dryden Coin & Jewellery Shop Murphy's Trophy Depot
339990 - All other miscellaneous manufacturing	Establishments, not classified to any other Canadian industry, primarily engaged in manufacturing activities. Click here for examples.	Forest + Fern Larson Bay Candle Co.
416390 - Other specialty-line building supplies merchant wholesalers	establishments, not classified to any other Canadian industry, primarily engaged in wholesaling specialized lines of building supplies. Click here for examples.	Fediuk Overhead Doors

NAICS	Description	Dryden Business
484110 - General freight trucking, local	Establishments primarily engaged in local general freight trucking. These establishments primarily provide trucking services within a metropolitan area and its hinterland. Generally the trips are same-day return. Click here for examples.	Courtesy Freight Purolator
48412 - General freight trucking, long distance	Establishments primarily engaged in long distance, general freight trucking. These establishments primarily provide trucking services between metropolitan areas. Generally the trips are not same-day return. Click here for examples.	Courtesy Freight Gardewine Manitoulin Transport Purolator
485310 - Taxi service	Establishments primarily engaged in providing passenger transportation by taxi (that is, automobiles, except limousines), not operated on regular schedules or routes. Click here for examples.	Cabbie's Taxi George's Taxi
488410 - Motor vehicle towing	Establishments primarily engaged in towing motor vehicles. Click here for examples.	Bert's Auto Wrecking Falcon Beach Auto & Towing TJ's Auto Value
491110 - Postal service	Establishments primarily engaged in operating the postal service. Establishments of the Post Office, other than those primarily engaged in providing courier services, are classified in this industry, as well as establishments that carry on one or more functions of the postal service on a contract basis, except the delivery of mail in bulk. Click here for examples.	Dryden Stn Main Post Office Purolator
493110 - General warehousing and storage	Establishments primarily engaged in operating public and contract general merchandise warehousing and storage facilities. These establishments handle goods in containers, such as boxes, barrels and drums, using equipment such as forklifts, pallets and racks. They are not specialized in the handling of a particular type of good. Click here for examples.	n/a
512110 - Motion picture and video production	Establishments primarily engaged in producing, or producing and distributing, motion pictures, videos, television programs or commercials. Click here for examples.	Blank Productions (Videography)

NAICS	Description	Dryden Business
512130 - Motion picture and video exhibition	Establishments primarily engaged in exhibiting motion pictures. Click here for examples.	Sunset Drive In
515110 - Radio broadcasting	Establishments primarily engaged in operating broadcasting studios and facilities for the production and transmission of radio programs to its affiliates or the public. Click here for examples.	CKDR
517310 - Wired and wireless telecommunications carriers (except satellite)	Establishments primarily engaged in providing telecommunications and video entertainment services to their customer premises and/or to mobile telecommunication devices over wired and wireless network facilities operated by them. These establishments can own a network, lease a network or combine leased and owned facilities and their networks can integrate various technologies. Click here for examples.	Bell Mobility Tbaytel (inside Oshtugon)
52211 - Banking	Establishments primarily engaged in accepting deposits and issuing loans. Examples of establishments in this industry are establishments of chartered banks, trust companies and deposit-accepting mortgage companies that are primarily engaged in accepting deposits and issuing loans. Click here for examples.	Alterna Bank of Montreal CIBC RBC Royal Bank TD Canada Trust
522130 - Local credit unions	Establishments of local credit unions and caisses populaires primarily engaged in accepting deposits from, and issuing loans to, members. Local credit unions raise funds from members through the sale of shares and the acceptance of deposits. Click here for examples.	Alterna Savings and Credit Union Limited

NAICS	Description	Dryden Business
5239 - Other financial investment activities	Establishments, not classified to any other industry group, primarily engaged in managing portfolios of securities and providing investment advice, trust, fiduciary, custody and other investment services. Click here for examples.	BMO Nesbitt Burns CIBC IG Private Wealth Management RBC Royal Bank Sun Life TD Canada Trust
531130 - Self-storage mini-warehouses	Establishments primarily engaged in renting or leasing space for self-storage. These establishments provide secure space (rooms, compartments, lockers, containers or outdoor space) where clients can store and retrieve their goods. Click here for examples.	A1 Storage Balla Bros Jonassen Self Storage Self Storage Dryden Turpin's Service and Storage
532111 - Passenger car rental	Establishments primarily engaged in renting passenger cars without drivers, generally for short periods of time. Click here for examples.	Enterprise Rent-A-Car National Car Rental
532280 -All other consumer goods rental	Establishments, not classified to any other Canadian industry, primarily engaged in renting consumer goods. Click here for examples.	Lappage Tent Rentals Silverback Cartel – Kayak & SUP Rentals
524 - Insurance carriers and related activities	Establishments primarily engaged in underwriting annuities, insurance policies and reinsurance, and the retailing of insurance and the provision of related services to policy holders. Industries are defined in terms of the type of risk being insured against, such as death, loss of employment due to age or disability, and property damage. Establishments that pool risk invest premiums to build up a portfolio of financial assets to be used against future claims. Contributions and premiums are set on the basis of actuarial calculations of probable payouts based on risk factors from experience tables and expected investment returns on reserves. Click here for examples.	CIBC Investors Group RBC Royal Bank The Standard Insurance Brokers SunLife TD Canada Trust Westland Insurance

NAICS	Description	Dryden Business
531212 - Offices of real estate brokers	establishments that are licensed or registered as real estate brokers where the primary activity is renting, buying and selling real estate for others, on a fee or commission basis. Click here for examples.	Austin & Austin Realty RE/MAX Northwest Realty Ltd. RE/MAX First Choice Realty Ltd. Latitude 50 Realty Sunset Country Realty
541110 - Legal services	Establishments primarily engaged in providing legal and paralegal services. Examples of establishments in this industry group are offices of lawyers, offices of notaries and offices of paralegals. Click here for examples.	Brenda Leigh Bell Law Offices McAuley & Partners Law Office Sunset Country Paralegal Vermeer Law Office
541690 - Other scientific and technical consulting services	Establishments, not classified to any other Canadian industry, primarily engaged in providing advice and assistance to other organizations on scientific and technical issues. Click here for examples.	Keewaytinook Okimakinak Public Works
54121 - Accounting, tax preparation, bookkeeping and payroll services	Establishments primarily engaged in auditing accounting records; designing accounting systems; preparing financial statements; developing budgets; preparing tax returns; processing payrolls; bookkeeping; and billing. Click here for examples.	BDO Canada – Dryden H&R Block Timson Tax & Bookkeeping Service Winters & Company Chartered Accountants
541310 - Architectural services	Establishments primarily engaged in planning and designing the construction of residential, institutional, leisure, commercial and industrial buildings and other structures by applying knowledge of design, construction procedures, zoning regulations, building codes and building materials. Click here for examples.	Horst Lang Construction
541320 - Landscape architectural services	Establishments primarily engaged in planning, designing and administering the development of land areas for projects such as parks and other recreational areas, airports, highways, hospitals, schools, land subdivisions, and commercial, industrial and residential areas by applying knowledge of land characteristics,	All-City Landscaping Ground Effex Landscaping Jason Anderson Concrete Sun Trac Contracting & Rentals Wildwood Contracting

NAICS	Description	Dryden Business
	location of buildings and structures, use of land areas, and design of landscape projects. Other examples include garden planning services and landscape planning services. Click here for examples.	
541330 - Engineering services	Establishments primarily engaged in applying principles of engineering in the design, development and utilization of machines, materials, instruments, structures, processes and systems. Click here for examples.	n/a
541340 - Drafting services	Establishments primarily engaged in drawing detailed layouts, plans and illustrations of buildings, structures, systems or components from engineering and architectural specifications. Click here for examples.	n/a
541350 - Building inspection services	Establishments primarily engaged in providing building inspection services. These establishments typically evaluate all aspects of the building structure and component systems and prepare a report on the physical condition of the property, generally for buyers or others involved in real estate transactions. Click here for examples.	Dryden Building Inspections (City of Dryden)
541360 - Geophysical surveying and mapping services	Establishments primarily engaged in gathering, interpreting and mapping geophysical data. These establishments often specialize in locating and measuring the extent of subsurface resources, such as oil, gas and minerals. Click here for examples.	n/a
541370 - Surveying and mapping (except geophysical) services	Establishments primarily engaged in providing surveying and mapping services of the surface of the earth, including the sea floor. These services may include surveying and mapping of areas above or below the surface of the earth, such as the creation of view easements or segregating rights in parcels of	n/a

NAICS	Description	Dryden Business
	land by creating underground utility easements. Click here for examples.	
541380 - Testing laboratories	Establishments primarily engaged in providing physical, chemical and other analytical testing services. Click here for examples.	n/a
541430 - Graphic design services	Establishments primarily engaged in planning, designing and managing the production of visual communication, so as to convey specific messages or concepts, clarify complex information or project visual identities. Click here for examples.	Boreal Signs Inc Douglas Graphic Design Signatures Signs & Stitchery
541920 - Photographic services	Establishments primarily engaged in providing still, video or computer photography services, such as the video taping of special events. Click here for examples.	A Austin Photos Samantha Hawkins Photography Shoppers Drug Mart Walmart Winding Roads Photography
541940 - Veterinary services	Establishments of licensed veterinary practitioners primarily engaged in the practice of veterinary medicine, dentistry, or surgery for animals. Click here for examples.	Dryden Veterinary Services Hillcrest Animal Clinic Trans Canada Pet Clinic
561320 - Temporary help services	Establishments primarily engaged in supplying workers for limited periods of time to supplement the workforce of the client. The individuals provided are employees of the temporary help service establishment. These establishments do not provide direct supervision of their employees at the clients' work sites. Click here for examples.	n/a

NAICS	Description	Dryden Business
561730 - Landscaping services	Establishments primarily engaged in providing landscape care and maintenance services and/or installing trees, shrubs, plants, lawns or gardens, and establishments engaged in these activities along with the construction (installation) of walkways, retaining walls, decks, fences, ponds and similar structures. Click here for examples.	All-City Landscaping Ground Effex Landscaping Jason Anderson Concrete Sun Trac Contracting & Rentals Wildwood Contracting
561722 - Janitorial services (except window cleaning)	Establishments primarily engaged in cleaning building interiors, and/or transportation equipment (aircraft, ships, rail cars) interiors. Click here for example.	1st Choice Janitorial Clean More Service
561740 - Carpet and upholstery cleaning services	Establishments primarily engaged in cleaning and dyeing rugs, carpets, and upholstery. Click here for examples.	1st Choice Janitorial Clean More Service
562990 - All other waste management services	Establishments, not classified to any other Canadian industry, primarily engaged in waste management activities. Click here for examples.	B&M Delivery Balla Bros
611210 - Community colleges and C.E.G.E.P.s	Establishments primarily engaged in providing academic, or academic and technical courses and granting associate degrees, certificates or diplomas that are below the university level. The requirement for admission to an associate or equivalent degree program is at least a high school diploma or equivalent general academic training. Click here for examples.	Confederation College – Dryden Campus
611510 - Technical and trade schools	Establishments primarily engaged in providing vocational and technical training in a variety of technical subjects and trades. The training often leads to non-academic certification. Click here for examples.	n/a
611610 - Fine arts schools	Establishments primarily engaged in providing instruction in fine arts. Click here for examples.	Dryden Piano Studio Stage Door Studios Studio Girwood

NAICS	Description	Dryden Business
611690 - All other schools and instruction	Establishments, not classified to any other Canadian industry, primarily engaged in providing instructional services. Click here for examples.	Drive Test – Driving School Loka Sangha Yoga Northwestern Ontario Medical
621110 - Offices of physicians	Establishments of licensed physicians primarily engaged in the private or group practice of general or specialized medicine or surgery. Offices of physicians, especially walk-in centres that accept patients without appointment and that often have extended office hours, are sometimes called clinics or medical centres. These establishments must not be confused with other out-patient centres that are also referred to as clinics. Click here for examples.	Dingwall Medical Clinic Lyle Osteopathy
621210 - Offices of dentists	Establishments of licensed dentists primarily engaged in the private or group practice of general or specialized dentistry or dental surgery. Offices of dentists, especially walk-in centres that accept patients without appointment and that often have extended office hours, are sometimes called clinics or dental centres. Click here for examples.	Dryden Dental Clinic Hall Denture Clinic King Street Family Dental Kinizsi Dental Northern Dental Clinic Viva Dental
621310 - Offices of chiropractors	Establishments primarily engaged in the private or group practice of chiropractic medicine. These practitioners provide diagnostic and therapeutic treatment of neuro-musculoskeletal and related disorders through the manipulation and adjustment of the spinal column and extremities. Click here for examples.	Hometown Chiropractic McLeod Chiropractic
621320 - Offices of optometrists	Establishments primarily engaged in the private or group practice of optometry. These practitioners provide eye examinations to determine visual acuity or the presence of vision problems and to prescribe eyeglasses, contact lenses and eye exercises. Click here for examples.	Dr. Brian Lockyer & Dr. Suzanne Lockyer, Optometrists Dr. Lisa Krasko-Turcotte, Dr. Doriana Veneziano
621330 - Offices of mental health practitioners (except physicians)	Establishments primarily engaged in providing mental health services. Clinical psychologists, psychiatric social workers and other mental health practitioners, who do not hold a doctoral degree in medicine, are included. Click here for examples.	BMS Thunder Bird Canadian Mental Health Association

NAICS	Description	Dryden Business
		Dryden Regional Mental Health and Addiction Services Firefly
621340 - Offices of physical, occupational, and speech therapists and audiologists	Establishments primarily engaged in administering medically-prescribed physical therapy treatment; planning and administering educational, recreational and social activities designed to help patients with disabilities regain physical or mental functioning or to adapt to their disabilities; and diagnosing and treating speech, language or hearing problems. Click here for examples.	Firefly (OT / ST / PT) HearingLife (Audiologist)
621390 - Offices of all other health practitioners	Establishments of health practitioners other than physicians, dentists, mental health practitioners, optometrists, chiropractors, audiologists, and physical occupational and speech therapists, primarily engaged in providing health services. Click here for examples.	CRG Kinesiology Sue Wood – Foot and Hand Reflexology
621494 - Community health centres	Establishments, with medical staff, primarily engaged in general out-patient care, which provides the services of a variety of health practitioners within the same establishment. These establishments are often referred to as clinics or centres and must not be confused with the offices of health practitioners classified to other industries that are also referred to as clinics or centres. Click here for examples.	Northwest Health Unit
621499 - All other out-patient care centres	Establishments, with medical staff, not classified to any other Canadian industry, primarily engaged in providing specialized out-patient services, such as dialysis. These establishments are often referred to as clinics or centres and must not be confused with the offices of health practitioners classified to other industries that are also referred to as clinics or centres. Click here for examples.	Chris Black – Registered Massage Therapy

NAICS	Description	Dryden Business
621510 - Medical and diagnostic laboratories	Establishments primarily engaged in providing analytic or diagnostic services. These services are generally provided to the medical profession, or to the patient on referral from a health practitioner. Click here for examples.	DRHC Clinical Laboratory
624110 - Child and youth services	Establishments primarily engaged in providing non-residential social assistance services for children and youth. Click here for examples.	Anishinaabe Abinoojii Family Services KRRD Child & Family Services
624190 - Other individual and family services	Establishments, not classified to any other Canadian industry, primarily engaged in providing non-residential, individual and family, social assistance services. Click here for examples.	Adult and Teen Challenge KRRD Child & Family Services Dryden Native Friendship Centre Paawidigong First Nations Forum
7111 - Performing arts companies	This industry group comprises establishments primarily engaged in producing live presentations that involve the performances of actors and actresses, singers, dancers, musical groups and artists, and other performing artists. Examples of establishments in this industry group are theatre companies, dance companies, musical groups and artists, circuses and ice-skating shows. Click here for examples.	Dryden Figure Skating Club Stage Door Studios
71121 - Spectator sports	This industry comprises professional, semi-professional, or amateur sports clubs primarily engaged in presenting sporting events before an audience. These establishments may or may not operate the facility for presenting these events. Independent professional, semi-professional or amateur athletes (in their role of athletes), and operators of race tracks are also included. Click here for examples.	Dryden GM Ice Dogs
711311 - Live theatres and other performing arts presenters with facilities	Establishments primarily engaged in operating live theatres and other arts facilities, and organizing and promoting performing arts productions held in these facilities. Click here for examples.	Stage Door Studios The Centre
711319 - Sports stadiums and other presenters with facilities	Establishments primarily engaged in operating sports stadiums and other sports facilities, and organizing and promoting sports	Dryden Agricultural Centre Dryden Ball Diamonds Dryden Memorial Arena

NAICS	Description	Dryden Business
	events or similar events held in these facilities. Click here for examples.	
713120 - Amusement arcades	Establishments primarily engaged in operating amusement arcades and parlours. Click here for examples.	n/a
7132 - Gambling industries	Establishments primarily engaged in operating gambling facilities, such as casinos, bingo halls and video gaming terminals; or providing gambling services, such as lotteries and off-track betting. Click here for examples.	Lotto One
713910 - Golf courses and country clubs	Establishments primarily engaged in operating golf courses and country clubs that operate golf courses along with dining facilities and other recreational facilities. Click here for examples.	Anderson's Homestead Golf Course Eagle's Landing Golf Course
713920 - Skiing facilities	Establishments primarily engaged in operating downhill and cross-country skiing areas, and equipment such as ski lifts and tows. Click here for examples.	Dryden Ski Club
713930 - Marinas	Establishments, known as marinas, primarily engaged in operating docking and storage facilities for pleasure-craft owners, with or without related activities, such as retailing fuel and marine supplies, boat repair and maintenance, and rental services. Click here for examples.	Natures Inn RV Park & Marina Yacht Club
713940 - Fitness and recreational sports centres	Establishments primarily engaged in operating health clubs and similar facilities featuring exercise and other active physical fitness conditioning, or recreational sports activities. Click here for examples.	Dryden Pool & Fitness Centre Dryden Recreation Centre Fitness Edge Workout Centre Kris Skamrud Personal Training
71395 - Bowling centres	Establishments primarily engaged in operating bowling centres. Click here for examples.	Timber Lanes
71399 - Other amusement and recreation industries	Establishments, not classified to any other industry, primarily engaged in operating recreation and amusement facilities and services. Establishments primarily engaged in maintaining non-gambling coin-operated amusement devices, in businesses operated by others, are included. Click here for examples.	Dryden District Conservation Archery Club Dryden District Curling Club Dryden Figure Skating Club Dryden Flying Club Dryden Ghost Riders Mountain Bike Club Dryden Gymnastics Club

NAICS	Description	Dryden Business
		Dryden Minor Hockey Dryden Power Toboggan Club Dryden Rifle and Pistol Club Dryden School of Judo Dryden Skatepark Dryden Ski Club Dryden Soccer Club Traditional Isshinryu Martial Arts Karate Club- Dryden
713992 - Other sport facilities	Establishments, not classified to any other Canadian industry, primarily engaged in operating other sport facilities not elsewhere classified. Click here for examples.	Nomad Mobile Lazer Tag
811119 - Other automotive mechanical and electrical repair and maintenance	Establishments, not classified to any other Canadian industry, primarily engaged in providing specialized motor vehicle mechanical or electrical repair and maintenance. Click here for examples.	Downtown Auto Repair Krown – RES Equipment Sales Pro Tint Rust Check – Northwestern Auto Sales Turpin’s Service and Storage
811121 - Automotive body, paint and interior repair and maintenance	Establishments primarily engaged in repairing, customizing and painting motor vehicle bodies, and repairing and customizing motor vehicle interiors. Click here for examples.	Dryden GM Walter’s Autobody
811122 - Automotive glass replacement shops	Establishments primarily engaged in replacing and repairing motor vehicle glass. Click here for examples.	D&S Auto Glass
811192 - Car washes	Establishments primarily engaged in washing and cleaning motor vehicles. Click here for examples.	Baywash Husky Car Wash Jack’s Car Wash
81211 - Hair care and esthetic services	Establishments primarily engaged in cutting and styling hair, providing esthetic services such as manicures and pedicures, or in providing a combination of hair care and esthetic services. Click here for examples.	A Cut Above the Rest Calypso Hair Fashions Creative View Hair Design Drift Away Salon Gales Nails Get Stoned Gem Nails

NAICS	Description	Dryden Business
		Illumination Beauty JMac's Barber Shop Karli Thomas Salon LA Medical Aesthetics Tangles Hair Studio The Hair Loft Top Coat Beauty
812190 - Other personal care services	Establishments, not classified to any other Canadian industry, primarily engaged in providing personal care services. Click here for examples.	Diamond and Dagger Tattoo Studio Tattoou4u & Body Piercing The Coven Tattoo Parlour
812310 - Coin-operated laundries and dry cleaners	Establishments primarily engaged in providing self-service, coin-operated laundry and dry-cleaning facilities for public use. Click here for examples.	Queen St. Laundry (QSL Tackle)
812320 - Dry cleaning and laundry services (except coin-operated)	Establishments primarily engaged in laundering, dry cleaning, and pressing apparel and linens of all types, such as leather. Click here for examples.	Novel Ideas
812910 - Pet care (except veterinary) services	Establishments primarily engaged in grooming, boarding and training pet animals. Click here for examples.	Dryden Canine Academy Hair of the Dog Hillcrest Groom & Board Nicole Boyd Dog Grooming Nose to Toes Pampered Paws Paws on Earl Ramona's Pet Grooming Tails of Happiness Canine Resort The Pet Store
812210 - Funeral homes	Establishments primarily engaged in preparing the dead for burial or interment and conducting funerals. Click here for examples.	Dryden Community Funeral Home Stevens Funeral Homes

1.4 Retail-Commercial Gap Analysis

To understand and identify the gaps in commercial and retail products and services which exist in the City of Dryden, four (4) main activities were undertaken to support this analysis. The four (4) activities included:

- A quantitative business count assessment as per the Canadian Business Register Repository;
- A qualitative assessment of Dryden-based businesses;
- A benchmark of those business segments (by NAICS Code) which do not have a Dryden presence (evident from either the qualitative or quantitative assessment) against neighbouring jurisdictions, Winnipeg, Kenora and Thunder Bay; and
- Feedback obtained during the Stakeholder Engagement Process.

These activities led a segmentation of the market in four (4) business segments:

- Retail Gap Analysis;
- Food & Beverage Services Gap Analysis;
- Professional Services Gap Analysis; and
- Hotel Gap Analysis.

1.4.1 Retail Gap Analysis

1.4.1.1 Supply Assessment

Table 9Error! Reference source not found. provides a detailed matrix which provides the quantitative/qualitative assessment and benchmark against Winnipeg, Kenora and Thunder Bay. There are 28 instances where the Canadian Business Register Repository indicated no known businesses in Dryden (of a particular NAICS Code), but the qualitative assessment indicated evidence that such commercial and retail trade did exist. These instances were denoted as a “discrepancy” within the table.

The table also provides insight into the leakage which may exist where Dryden residents are travelling to these other commercial hubs for their commercial products and service needs as by the number and variety of business establishments listed in those areas.

Table 9 - Qualitative vs. Quantitative Assessment of Dryden’s Missing Business Segments

NAICS Code	NAICS Description	Winnipeg		Kenora		Dryden		Thunder Bay		Dryden Qualitative Assessment
		Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	
441210	Recreational vehicle dealers	1	3	-	-	-	-	2	5	n/a
442291	Window treatment stores	6	13	1	-	2	-	-	3	Blinds by Molina
442292	Print and picture frame stores	2	6	-	-	-	-	2	1	Walmart MacPrint Shoppers Drug Mart
442298	All other home furnishings stores	11	27	-	-	-	-	2	6	Forest+Fern Kano Reid Northwest Goods Second Chance Treasures (second hand)
443144	Computer and software stores	14	18	1	1	-	-	3	1	Marnic’s Mobile Oshtugon Wilson’s Business Solutions

NAICS Code	NAICS Description	Winnipeg		Kenora		Dryden		Thunder Bay		Dryden Qualitative Assessment
		Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	
443146	Audio and video recordings stores	2	7	-	-	-	-	-	1	Walmart
444120	Paint and wallpaper stores	2	30	-	1	-	-	1	6	Rona Walmart Home Hardware Canadian Tire
444130	Hardware stores	7	5	-	-	-	-	1	3	Canadian Tire EECOL Electric Emcon Home Hardware Intercity Industrial Supply Rona
444190	Other building material dealers	21	40	-	1	-	-	4	12	Richard's Building Supply
444210	Outdoor power equipment stores	1	1	-	-	-	-	-	1	Canadian Tire Dryden Powersports Home Hardware Rona St Aubin Saw Shop Walmart
445210	Meat markets	11	28	-	-	-	-	-	5	807 Food Co-op Cloverbelt Country Meats (Oxdrift abattoir) Extra Foods Huber's Bavarian Meats M&M Meats Mikewell Farms Safeway Walmart
445220	Fish and seafood markets	2	5	-	-	-	-	-	1	Extra Foods Safeway

NAICS Code	NAICS Description	Winnipeg		Kenora		Dryden		Thunder Bay		Dryden Qualitative Assessment
		Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	
										Walmart
445230	Fruit and vegetable markets	3	3	-	-	-	-	-	-	807 Food Co-op Agritech North Cloverbelt Country Farmers Market (seasonal)
445291	Baked goods stores	8	20	-	-	-	-	2	2	Bulk Zone Kano Reid Safeway Walmart
445292	Confectionery and nut stores	3	12	-	-	-	-	1	2	Bulk Zone Extra Foods Safeway Shoppers Drug Mart Walmart
446191	Food (health) supplement stores						-			Awakened Roots Bulk Zone Safeway Shoppers Drug Mart Walmart
448150	Clothing accessories stores	11	30	-	-	-	-	-	4	Kano Reid Northwest Goods
448320	Luggage and leather goods stores	-	10	-	-	-	-	-	1	Canadian Tire Walmart
451111	Golf equipment and supplies specialty stores	4	4	-	-	-	-	1	-	Anderson's Golf Course Canadian Tire Eagles Landing Golf Course Walmart
451112	Ski equipment and supplies specialty stores	1	1	-	1	-	-	1	1	n/a

NAICS Code	NAICS Description	Winnipeg		Kenora		Dryden		Thunder Bay		Dryden Qualitative Assessment
		Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	
451113	Cycling equipment and supplies specialty stores	4	12	-	1	-	-	2	2	Canadian Tire Walmart
451120	Hobby, toy and game stores	16	41	-	-	-	-	1	9	Kano Reid Pharmasave
451140	Musical instrument and supplies stores	18	10	-	-	-	-	3	1	Oshtugon
453910	Pet and pet supplies stores	14	40	-	2	-	-	1	6	Canadian Tire The Pet Store Walmart
453930	Mobile home dealers	2	1	-	-	-	-	1	-	n/a
453999	All other miscellaneous store retailers (except beer and wine-making supplies stores)	83	99	5	3	1	-	12	13	First Choice Janitorial (Beachcomber Dealer)
454210	Vending machine operators	15	4	-	-	-	-	2	2	Old Dutch
454311	Heating oil dealers	1	-	-	1	-	-	-	1	Mastrangelo Fuels Morgan Fuels Superior Propane
454319	Other fuel dealers	1	4	1	-	-	-	1	2	Mastrangelo Fuels Morgan Fuels
812310	Coin-operated laundries and dry cleaners	7	11	-	1	-	-	1	3	QSL Tackle --> Queen St. Laundry
812320	Dry cleaning and laundry services (except coins)	10	27	-	-	-	-	1	3	Novel Ideas

* The research team was unable to identify and/or verify (from a qualitative approach) and in consultation with City of Dryden staff the names of the local businesses which were indicative of having a business establishment (either without or with employees) within the City of Dryden as contained within the Canadian Business Register Repository.

1.4.1.2 Demand Assessment

A Demand Assessment was undertaken to ascertain more precisely the need for specific retail product and/or service offerings within the city. The results from the previous supply assessment were also cross-referenced with the feedback obtained from the stakeholder engagement process, including the general public online survey, one-on-one meetings, focus group discussions and through additional consultation with City staff. These activities supported the below gap identification for a series of retail business opportunities, including:

1. A year-round movie theatre and entertainment.
 - Currently, Sunset Drive-In Theatre is the only Dryden-based business in this category, however, it is a drive-in theatre that operates seasonally.
 - In Canadian large cities, the average number of movie screens per 100,000 of population is ten (10). With approximately 25,000 people in its attraction radius, Dryden could probably host one (1) or two (2) screens in a small facility or a multi-use facility providing other entertainment products.
 - Despite rising competition from external substitutes, the Movie Theatres industry in Canada is expected to grow over the five (5) years to following historic declines in revenue due to the COVID pandemic. Households are expected to continue viewing the movie-going experience as a worthwhile, inexpensive means of out-of-home entertainment. Steady economic growth across Canada will likely bolster consumers' disposable income, encouraging them to spend more on discretionary goods, such as movie tickets. However, considerable uncertainty remains regarding the extent to which Canadians' media habits were altered by pandemic disruptions that further encouraged the use of at-home digital streaming platforms for film watching.
 - On the supply side, more and more movie titles intended for theatres are being made available only through streaming services. While the challenges are numerous, on the positive side, movie theatre attendance did nevertheless rebound in other key international markets once restrictions were lifted. The industry will also continue to leverage pre-pandemic specialized movie experience trends that helped operating revenues grow in Canada. For example, before the pandemic, several theatres were offering a larger variety of available concessions, including full meals, alcoholic beverages, and enhanced seating and viewing options.
2. Increased number and variety of family entertainment options (amusement establishments).
 - Examples include amusement device (except gambling) parlours, coin-operated; amusement devices (except gambling), operated in own facilities; electronic game arcades; family fun centres; indoor play areas; pinball arcades; and video game arcades

(except gambling machines).¹¹ There are no such establishments in Dryden today. With electronic games, arcades and video games going online, the gap would be more targeted toward family-oriented fun.

- Statistics show that North American families will visit a full-featured family amusement center 3.2 - 4.6 times per year. The same data also indicates that the average dollar spent in a family fun center is between \$12 - \$22 per visit, depending on your activity mix;
 - Analyzing the market population by drive-times also shows that the average distance people will travel within a less densely populated rural areas equals to a 45 - 60-minute drive.
3. To support the growing demand for sporting equipment like cycling and sport mountain biking,¹² and skiing and snowboarding industry, there is demand specialty stores.
- These establishments are primarily engaged in retailing new cycling equipment and supplies. Examples include bicycle and bicycle parts dealers (except motorized), bicycle parts and accessories, bicycles, retail sales and repairs, new bicycles combined with repair, repair as primary source of receipts, retailing of used cycling equipment and supplies, and provision of repair services.
 - Within Dryden, Four Seasons Footwear and Accessories ceased operations in early 2022. Some of the box stores do carry some of that equipment but probably not of the quality level required be some of the population.
 - This type of business activity may be ideally suited to be part of a larger operation/operator, such as within a sporting goods store.
4. The need for an increased number and type of clothing accessory stores.
- These establishments are primarily engaged in retailing a single or general line of new clothing accessories. Examples include accessories in leather or other material (e.g., body belts, purses, bags, wallets, billfolds), hosiery stores, tie shops, umbrella stores.
 - Currently, Kano Reid and Northwest Goods and the two (2) Dryden-based businesses which most closely resembles clothing accessory stores.
 - The average Canadian household spends \$285 on clothes per month.
 - Gen Zers in Canada are buying second-hand fashion 2.5 times faster than any other generational cohort.

¹¹ Amusement arcades in Winnipeg include U-Puttz Amusement Centre, Tim & Rick's Custom Arcade, The Rec Room, Lazer Runner F4, Lazertopia, Curbside Game Box, Jack Pott's Thrill Zone, Activate Games, Arena VR, Xscape Cineplex Theatre Arcades and Kid City.

¹² <https://www.forbes.com/sites/timnewcomb/2020/07/13/amidst-cycling-surge-sport-of-mountain-biking-seeing-increased-sales-trail-usage/?sh=160245e43ddf>

5. With the land and marine recreational vehicle industry experiencing growing demand, there is a gap for a rental operator of outdoor recreational land and marine vehicles within the city.
 - Such business activities could include pleasure boats rental (canoes, rowboats, sailboats, seadoos), snowmachines, all terrain vehicles (ATVs) and recreation and sports equipment rental, including ice shacks.
 - This type of activity can respond to the attraction radius clientele but also tourist flocking to the region year round.
 - There are three (3) such businesses in each Kenora and Thunder Bay.
6. There is a need for a recreational vehicle dealer within the city.
 - These establishments are primarily engaged in retailing new and used recreational vehicles (RVs), such as motor homes, recreational trailers and campers. These establishments also typically retail replacement parts and accessories, and provide repair services.
 - Dryden is a centralized location within the “Heart of Canada Loop”¹³ between Thunder Bay and Winnipeg. A number of planned stops are identified within/around Dryden as part of the “14-Day ‘City and Wilderness’ RV Tour”¹⁴
 - Recreational vehicle dealer, Railside Sports & Marine ceased operations and become Dryden Power Sports.
 - In Canada there is on average one (1) dealership per 35,000 of population. This statistic would support potentially one (1) such provider that could offer a number of maintenance and repair services to cater to all RV’s visiting the region.
 - In 2018, there were just over 2.1 million households in Canada (approximately 15%) with an owned RV. This figure was slightly up from, but in line with, the 13% to 14% from previous studies (2012 and 2005).
 - The Canadian RV Association said 2022 started with a backlog of orders, but more supply is rolling into the country in the past few months.
 - Wholesale shipments of RVs to Canada are up almost 30 percent (as of March 31, 2022).
7. With growing demand for access to fresh fruits and vegetables, fish and meat, dairy and other farm produced products, there is a need to expand the seasonality of the existing Farmers’ Market which is currently servicing the Dryden area.
 - Currently, Cloverbelt Country Farmers Market in Dryden operates seasonally on Thursdays throughout July - September (3:00-6:00pm) and in Oxdrift on Saturdays throughout June - September (9:00am-noon).
 - An indoor venue once a week would be required – seasonality of fresh fruit was not validated and many communities in more agricultural regions of the province have farmer’s market only in the summer.

¹³ <https://go.ontario.app/routes/14764>

¹⁴ <https://go.ontario.app/?id=15142>

8. There is an opportunity to explore expanding the “hobby, toy and game stores” offering within the city.
- These establishments are primarily engaged in the retailing of new toys, games, and hobby and craft supplies. Examples include: ceramics supplies; craft kits and supplies; hobby kits, model; scrapbooking supplies; and toy and game stores.
 - Currently, Kano Reid and Pharmasave are the two (2) Dryden-based businesses in this category. Little Toy Box closed its business in 2021. Closest stores are now in Winnipeg and Thunder Bay.
 - There are 2,380 such stores across Canada making it one (1) store per 16,000 of population. Beyond this statistic many of these stores today target teenagers and young adults. With many college-age students leaving the Dryden area for post-secondary education, any potential retailer would need to obtain a clearer demographic analysis to rightfully assess the opportunity.
 - As of June 2021, there were roughly 548 hobby, toy, and game stores located in the province of Ontario, making it the Canadian province with by far the highest share of them.
 - In Canada, the average yearly household expenditure on toys is \$170. These toy industry trends and statistics were taken from a 2010–2017 survey of over 17,000 Canadians. Statistics from 2013 indicated that the average expense per buyer on tech toys that year stood at \$193, while it was around \$203 for traditional toys.

1.4.13 Local Impacts

There are a multitude of local impacts which have the potential to not only benefit the city, but also local residents and other businesses – some of which could become local suppliers or service providers. The following local impacts have been identified by having filled the gaps with the following proposed retail offerings:

1. A year-round movie theatre combined with amusement arcade establishments can:
 - a. Offer a safe and fun option for youth, adults and families to congregate in small or large groups;
 - b. Provide a one-stop-shop opportunity which incorporate multiple activities within one facility leading to a greatly likelihood of long-term sustainability;
 - c. Retain consumer spending within the local economy;
 - d. Local job creation;
 - e. Stimulate local economy; and
 - f. Increased property tax revenue generation.
2. Cycling equipment and supplies specialty stores combined with ski equipment and supplies can:
 - a. Promote and supports active recreation;
 - b. Provide a one-stop-shop opportunity which incorporate multiple activities within one facility leading to a greatly likelihood of long-term sustainability.
 - c. Promote environmental sustainability;
 - d. Create additional niche retail opportunities in the city;

- e. Retain consumer spending within the local economy;
 - f. Local job creation;
 - g. Stimulate local economy; and
 - h. Increased property tax revenue generation.
- 3. Clothing accessory stores
 - a. Create additional niche retail opportunities in the city;
 - b. Retain consumer spending within the local economy;
 - c. Local job creation;
 - d. Stimulate local economy; and
 - e. Increased property tax revenue generation.
- 4. Rental operator of outdoor recreational land and marine vehicles and possibly combined with a recreational vehicle dealer can:
 - a. Support local tourism sector;
 - b. Provides more recreational activities for local residents;
 - c. Retain consumer spending within the local economy;
 - d. Local job creation;
 - e. Stimulate local economy; and
 - f. Increased property tax revenue generation.
- 5. Farmer's Market
 - a. Increased food availability;
 - b. Create centralized avenue for local producers to sell their products through;
 - c. Support agri-tourism industry;
 - d. Helps to preserve the areas' rural livelihoods and farmland;
 - e. Increased access to fresh, nutritious food;
 - f. Support healthy communities;
 - g. Retain consumer spending within the local economy;
 - h. Stimulate local economy;
- 6. Hobby, toy and game stores
 - a. Provides more leisure and recreational activities for local residents;
 - b. Creates additional niche retail opportunities in the city;
 - c. Retain consumer spending within the local economy;
 - d. Local job creation;
 - e. Stimulate local economy; and
 - f. Increased property tax revenue generation.

1.4.2 Food & Beverage Sector

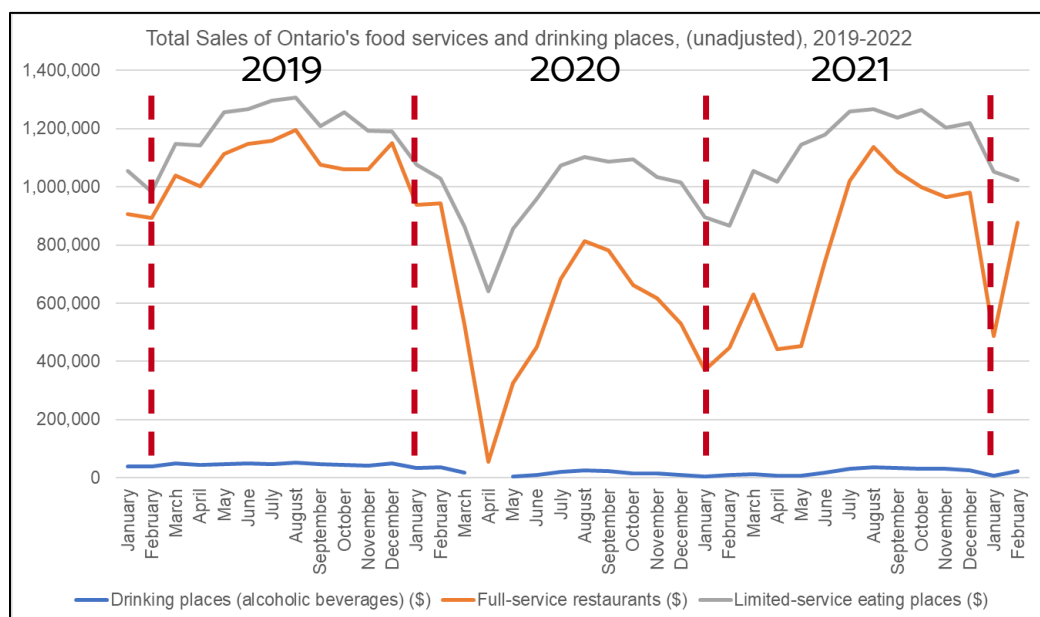
1.4.2.1 Market Trends

Many businesses operating in Ontario's food and beverage services industry experienced extreme volatility in their sales between Q4-2019 and Q3-2021 resulting from the COVID pandemic with health restrictions severely impacted the ability to offer in-dining, the ability to have a full staff compliment in the kitchen (or close proximity) and even restaurant closures. During this time, consumers were purchasing more groceries and even stockpiling them. Into 2021, food and beverage service providers began to experience supply chain disruptions which impacted their ability to obtain the ingredients and products needed to maintain a consistent food and beverage offering. Additionally, even once restaurants began to reopen, health restrictions continued to reduce their capacity.

As presented in Figure 15, Ontario's full-service restaurants experienced a 42.7% decline in sales between 2019 and 2020, before seeing relief in 2021 by an increase in sales (at a provincial level) of 26.0%. During the first two (2) months of 2022 the industry has already experienced a 67% increase in sales of Ontario's full-service restaurants over the first two (2) months of 2021 – a trend that these businesses are hoping continues to help offset the losses in 2020 and 2021.

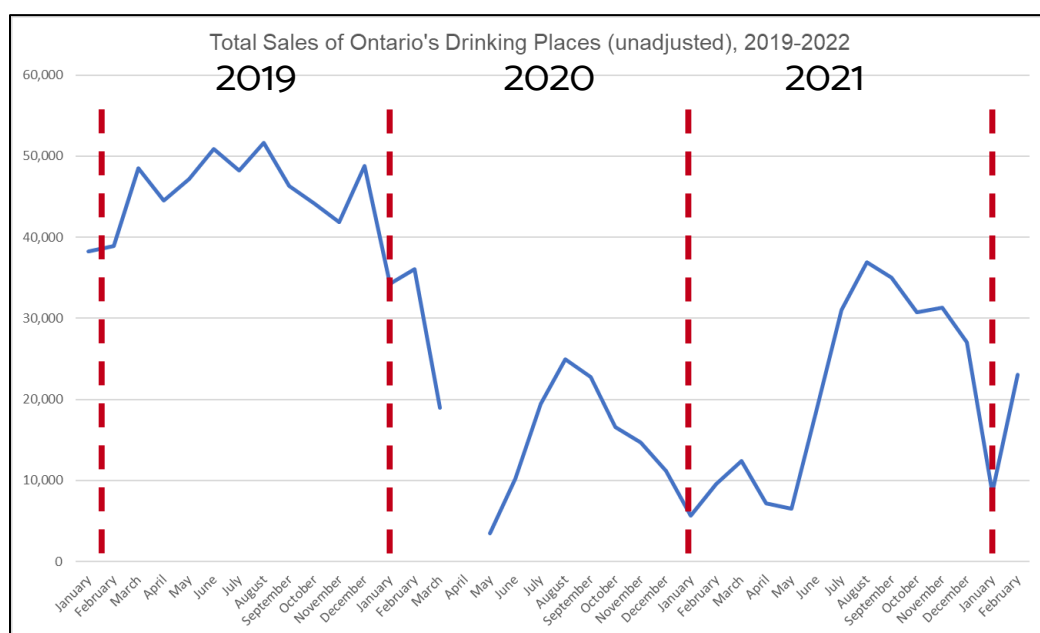
Similar to full-service restaurants, limited-service eating places also experienced similar economic conditions. As presented in Figure 15, Ontario's limited-service eating places experienced a 17.2% decline in sales between 2019 and 2020, before seeing relief in 2021 by an increase in sales (at a provincial level) of 15.0%. The first two (2) months of 2022 has already experienced a 18% increase in sales of Ontario's limited-service eating places over the first two (2) months of 2021 – while not as strong as full-service restaurants, this still represents a level of optimism for those in this industry.

Figure 15 - Total, food services and drinking places, Ontario (unadjusted), 2019-2022



In Figure 16, Ontario's drinking places experienced the largest decline in sales activity between the three (3) food and beverage service segments with a decline of 61.7% between 2019 and 2020, before seeing relief in 2021 by an increase in sales (at a provincial level) of 18.7%. The first two (2) months of 2022 has already experienced a 107% increase in sales of Ontario's drinking places over the first two (2) months of 2021.

Figure 16 - Total Sales of Ontario's Drinking Places (unadjusted), 2019-2022



* Data was not available for May 2020.

1.4.2.2 Supply Assessment

The Canadian Business Register Repository indicates that there is only a single business operating under NAICS 722410 as drinking places (alcoholic beverages), however, the qualitative assessment identified nine (9) establishments which provide a similar experience. The Canadian Business Register Repository reported two (2) businesses without employees and eight (8) with employees in Dryden operating under NAICS 722511 as full-service restaurants. Comparatively, the qualitative assessment identified 11 such businesses that could be indicative of a full-service restaurant. Lastly, the Canadian Business Register Repository noted three (3) businesses without employees and ten (10) with employees operating under NAICS 722512 as limited-service eating places. The qualitative assessment identified 15 such establishments.

As evident from the number (and assumed variety) of businesses operating in these three (3) categories, the comparable jurisdictions may support the mix of cuisine options and experiences that Dryden residents are seeking.

Table 10 - Qualitative vs. Quantitative Assessment of Dryden’s Missing Food and Beverage Businesses

NAICS Code	NAICS Description	Winnipeg		Kenora		Dryden		Thunder Bay		Dryden Qualitative Assessment
		Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	
722410	Drinking places (alcoholic beverages)	7	25	-	-	-	1	2	12	There is only one (unidentified) Drinking place in Dryden. To note, that all full-service restaurants do offer alcoholic beverages.
722511	Full-service restaurants	162	663	2	14	2	8	14	97	B&B Roadhouse Bar and Grill Ho Ho's Hong Kong House Masala Restaurant Mulligan's Restaurant Pizza Hut Springwater Café The PI The Riverview Lodge Timber Lanes Twin Towers

722512	Limited-service eating places	87	619	5	12	3	10	15	103	7-11 A&W The Chip Box Crooked Arrow Catering Dairy Queen Domino's Pizza Husky Restaurant (Truck Stop) Just G's Kano Reid Kathy's Catering KFC McDonald's Subway Tim Hortons Your Choice Catering
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1.4.2.3 Demand Assessment

A Demand Assessment was undertaken to ascertain more precisely the need for specific food and beverage offerings within the city. Feedback obtained from the stakeholder engagement process, including the general public online survey, one-on-one meetings, focus group discussions and through additional consultation with City staff, demand for a series of unique food and beverage offerings emerged, including:

1. Full-service restaurants
 - a. To have a dynamic restaurant scene, the balance of full-service versus fast-food must be at least 1 to 1. Communities known to be strong tourism destinations will see ratios of 1.5 to 1 up to 3 to 1. The situation in Dryden today point to a ratio 0.76 to 1 suggesting a gap does exist in full-service restaurants.
 - b. Annual consumer spendings is also higher in tourism destinations than regular urban centers. Statistics (2021 Census Canada) show the average annual restaurant spending per family to be in the \$2,700 range.
 - c. From the qualitative analysis, the City of Dryden seems to be missing brand name full-service restaurants. There is interest from local residents to see other chain restaurants establish a presence necessary to expand the number and type of in-dining options locally.
 - d. Dining is one of the top five (5) tourist activities on leisure trips (Pizam et al. 2014), and it plays a central role in travel experience, as all tourists need to eat when they travel. Food products also attract significant expenditure from tourists, accounting for a quarter to a third of their overall spending (Correia et al. 2018).
 - e. Another option would be to attract restaurants offering a food-experience with a compelling design and ambiance (micro-breweries, speciality food, etc.)
2. Limited-service eating places
 - a. The city has limited ethnic and healthy limited-service eating places. Examples of ethnic cuisine dining establishments may include Chinese, Mexican, Italian, Japanese, Thai and Indian. Examples of healthy limited eating place may include Freshii, Bar Burrito, Pita Pit, Greenhouse Juice Co., Impact Kitchen and Salus Fresh Foods Inc.
3. Drinking places (alcoholic beverages)
 - a. The gap analysis did not provide clear data on this activity but the overall nightlife industry should provide a large share of dining, entertainment, recreational, and cultural activity to the Community. The nightlife economy generates amenities that attract workers, employers, residents, and visitors to the City. They enhance to overall lifestyle experience.
 - b. Nightlife establishments provide employment opportunities for those looking for an income source during off-peak work hours. Approximately 57% of employment in the nightlife industry is comprised of part-time jobs, a source of flexible employment increasingly important in today's economy.

- c. With a strong presence of temporary workers in the region, adding businesses to grow this activity would support the attractiveness of Dryden and make the City more and more a destination for travelers and visitors

1.4.2.4 Local Impacts

Dryden residents can benefit from having a strong and diverse food and beverage offering throughout the city as there are many impacts which can be felt locally, including:

- A University of Oxford research study found that people who have a 'local' that they visit regularly tend to feel more socially engaged and contented and are more likely to trust other members of their community. They also observed that those without a local pub had significantly smaller social networks and felt less engaged with, and trusting of, their local communities.¹⁵
- Promotes alcohol consumption in a group setting.
- People who regularly frequent their local bar are happier, have more friends, and are overall more satisfied with their life;¹⁶
- Spending time at a local pub enhances individual social lives and community connections;
- People who frequent their neighborhood bar tend to be more moderate drinkers;
- Pubs are being transformed from mere drinking establishment into a cornerstone of community with their pool leagues, dart tournaments, trivia nights and other clubs;
- When people can walk to a nearby bar, they're far less likely to drink and drive;
- Besides generating tax revenue from alcohol sales, bars employ local workers who put their earnings right back into the community;
- Since the owners of local drinking establishments tend to have strong community ties, bars and breweries are often invaluable contributors to city events and charity causes;
- Increases variety of dining options / experiences within the city for seasonal / permanent residents;
- Creates additional incentive / opportunity to draw transient visitors off Highway 17 into the city;
- Consumer spending remains within the local economy;
- Creates additional niche retail opportunities in the city;
- Local job creation; and
- Helps to stimulate the local economy.

¹⁵ <https://www.ox.ac.uk/news/2017-01-06-your-health-benefits-social-drinking>

¹⁶ <https://riffraffbrewing.com/why-your-neighborhood-bar-is-good-for-you/>

1.4.3 Professional Services Gap Analysis

Professional services are occupations in the service sector requiring special training in the arts or sciences. Some professional services, such as architects, accountants, engineers, doctors and lawyers, require the practitioner to hold professional degrees or licenses and possess specific skills.

1.4.3.1 Supply Assessment

Table 11 brings together a quantitative and qualitative assessment to understand local supply of these professional services and to gain insights into the potential leakage to the three (3) major urban centres on either side of the city. The assessment considered two (2) primary NAICS categories of “541 – Professional, scientific and technical services” and “621 - Ambulatory health care services”. It is noted that in situations where there is not a local presence of a particular professional service offering, they are represented in both Winnipeg and Thunder Bay and in some situations, one (1) to two (2) locations may exist in Kenora. The professional services which do not have a local presence include architectural services, engineering services, drafting services, geophysical surveying and mapping services, surveying and mapping (except geophysical) and testing laboratories.

Table 11 - Qualitative vs. Quantitative Assessment of Dryden’s Missing Professional Service Businesses

NAICS Code	NAICS Description	Winnipeg		Kenora		Dryden		Thunder Bay		Dryden Qualitative Assessment
		Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	
541110	Legal services	484	333	7	15	1	4	38	75	Brenda Leigh Bell Law Offices McAuley & Partners Law Office Sunset Country Paralegal Vermeer Law Office
54121	Accounting, tax preparation, bookkeeping and payroll services	238	232	8	7	3	3	31	37	BDO Canada - Dryden H&R Block Timson Tax & Bookkeeping Service Winters & Company Chartered Accountants
541310	Architectural services	51	72	1	2	-	-	11	8	n/a
541320	Landscape architectural services	10	12	3	-	-	-	-	-	All-City Landscaping Ground Effex Landscaping Jason Anderson Concrete Sun Trac Contracting & Rentals

NAICS Code	NAICS Description	Winnipeg		Kenora		Dryden		Thunder Bay		Dryden Qualitative Assessment
		Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	
										Wildwood Contracting
541330	Engineering services	147	128	2	1	2	-	22	33	n/a
541340	Drafting services	24	14	-	-	-	-	5	2	n/a
541350	Building inspection services	17	12	-	-	1	-	8	3	Dryden Building Inspections (City of Dryden) Grennier Home Inspections recently ceased operations
541360	Geophysical surveying and mapping services	7	1	-	-	-	-	2	1	n/a
541370	Surveying and mapping (except geophysical) services	3	11	1	1	1	-	2	2	n/a
541380	Testing laboratories	4	17	-	-	-	-	2	8	n/a
541940	Veterinary services	24	46	1	1	0	3	5	12	Dryden Veterinary Services Hillcrest Animal Clinic Trans Canada Pet Clinic
621110	Offices of physicians	1,180	1,097	22	14	7	11	129	204	Dingwall Medical Clinic Lyle Osteopathy
621210	Offices of dentists	320	376	8	7	2	2	35	59	Dryden Dental Clinic Hall Denture Clinic King Street Family Dental Kinizsi Dental Northern Dental Clinic Viva Dental
621310	Offices of chiropractors	83	67	1	1	-	-	14	20	Hometown Chiropractic McLeod Chiropractic

NAICS Code	NAICS Description	Winnipeg		Kenora		Dryden		Thunder Bay		Dryden Qualitative Assessment
		Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	
621320	Offices of optometrists	75	38	1	1	4	-	6	14	Dr. Brian Lockyer & Dr. Suzanne Lockyer, Optometrists Dr. Lisa Krasko-Turcotte, Dr. Doriana Veneziano
621330	Offices of mental health practitioners (except physicians)	123	26	5	2	1	-	24	5	BMS Thunder Bird Canadian Mental Health Association Dryden Regional Mental Health and Addiction Services Firefly
621340	Offices of physical, occupational, and speech therapists and audiologists	214	91	2	-	1	-	28	10	Firefly (OT / ST / PT) HearingLife (Audiologist)
621390	Offices of all other health practitioners	434	142	10	4	9	1	86	23	CRG Kinesiology Sue Wood – Foot and Hand Reflexology
621510	Medical and diagnostic laboratories	52	92	-	1	-	3	4	8	Dingwall Medical Clinic DRHC Clinical Laboratory

1.4.3.2 Demand Assessment

A Demand Assessment was undertaken to ascertain more precisely the need for specific professional services within the city. Feedback obtained from the stakeholder engagement process, including the general public online survey, one-on-one meetings, focus group discussions and consultation with City staff, demand for a series of unique professional service offerings emerged, including:

1. Legal services
 - a. The existing four (4) local legal firms collectively provide the following legal services: residential and commercial real estate (3); corporate and commercial law (3); criminal law; will and power of attorney (3); estates (3); uncontested divorce and mediation (2); notary and commissioner of oaths (2); Highway Traffic Act; court filings; provincial offences court; landlord and tenant disputes; and records suspensions. There is no major gap in this field of activity.
2. Accounting, tax preparation, bookkeeping and payroll services
 - a. The city has one internally recognized accounting firm, one (1) dedicated to tax preparation and two (2) smaller independent firms.
 - b. While many professional accounting services can be completed remotely, including the allowance for digital signatures, this creates a business environment where individuals and businesses can work with their preferred accounting firm with less dependency on a nearby physical location.
 - c. Ontario statistic show one (1) person works in the accounting and finance sector for every 173 Ontarians. With only three (3) accounting firms identified in Dryden, the market data support trying to attract one (1) or more firms and specialized individual.
3. Architectural services
 - a. While there is no evidence of local architectural services, individuals seeking new home construction would typically work through the developer and their list of preferred/approved architects.
 - b. Related to commercial and/or industrial construction, businesses currently have to seek out their own architects and while two (2) such firms are located in Kenora, there is a larger representation in both Winnipeg and Thunder Bay.
 - c. The quantitative assessment revealed that Winnipeg has 51 businesses without and 72 with employees, Kenora has one (1) business without and two (2) with employees, and that Thunder Bay has 11 businesses without and eight (8) with employees.
4. Municipal Planning, Design, Landscape architectural services
 - a. The five (5) businesses identified locally offer components of this professional service classification including “garden planning services” and “landscape planning services”. Additional services such as “city, town or urban planning services”, “land use planning services”, “offices of landscape architects” and “recreational area planning and designing services” must be sourced outside of the city.

5. Engineering services
 - a. With no evidence of a local engineering firm, a feasibility study may be required (as additional due-diligence) to determine if there is sufficient local demand to support the attraction of such a firm. Larger firms may be more inclined to establish a local presence with a dedicated staff member who works from a home office setting until such demand warrants a physical location.
 - b. The quantitative assessment revealed that Winnipeg has 147 businesses without and 128 with employees, Kenora has two (2) businesses without and one (1) with employees, and that Thunder Bay has five (5) businesses without and two (2) with employees.
6. Drafting services
 - a. With no evidence of a local firm specializing in drafting services, again a more in-depth study may be required (as additional due-diligence) to determine if there is sufficient local demand to support the attraction of such a firm.
7. Building inspection services
 - a. Other than building inspections provided by the City's Building and Planning Department, there is no evidence of a local private sector firm offering building inspection services.
8. Geophysical surveying, other surveying and mapping services
 - a. Similarly, there is no evidence of a local firm specializing in geophysical survey and mapping services,
 - b. The quantitative assessment revealed that Winnipeg has seven (7) businesses without and one (1) with employees and that Thunder Bay has two (2) businesses without and one (1) with employees.
9. Testing laboratories
 - a. With no evidence of a local firm specializing in testing laboratory services, a feasibility study may be required (as additional due-diligence) to determine if there is sufficient local demand to support the attraction of such a service provider.
 - b. The quantitative assessment revealed that Winnipeg has four (4) businesses without and 17 with employees, and that Thunder Bay has two (2) businesses without and eight (8) with employees.
10. Veterinary services
 - a. There are currently three (3) clinics offering veterinary services within the city.
 - b. There has been an increase in pet (dog and cat) adoption throughout and emerging from the COVID pandemic. This will inevitably lead to increased wait times for scheduling veterinary-related appointments.
 - c. Among 3,407 Canadian veterinary practices (or one per 11,500 citizens), 11% devote themselves to large animals, 62% to small animals and 27% to both types of clientele.

- d. This statistic would suggest the Dryden market is well maintained and that there is little to now gap that exists locally.
- 11. Offices of physicians
 - a. While the qualitative assessment revealed two (2) offices of physicians, Kenora with 1/3 more residents, has 22 businesses without and 14 with employees in the same sector.
 - b. Health leaders should look to bridge that gap.
- 12. Offices of dentists
 - a. While the qualitative assessment revealed six (6) offices of dentists, the Canadian market point to one dentist per 2,100 citizens. Depending on the size of these dental office, there is no gap for the city itself but maybe one if the attraction radius is considered. This statement does not account for dentist offices in Sioux Lookout or other regional settlement areas.
- 13. Offices of chiropractors
 - a. There is no evidence of a local office primarily engaged in the private or group practice of chiropractic medicine. The Canadian market shows one chiropractor per 4,200 citizens thus suggesting there would be market in Dryden for at least two (2) or more such professional.
- 14. Offices of optometrists
 - a. The qualitative assessment revealed two (2) offices of optometry in Dryden. A total of 5,959 optometrists are licensed across Canada. The nationwide distribution of optometrists is variable across Canada; they are predominantly concentrated in urban areas. The national mean ratio of optometrists was 1.70 optometrists per 10,000 people (range = 0.13 to 2.92) so there would be no gap for the City of Dryden itself but one office could be added if we account for people in the attraction radius.
- 15. Offices of mental health practitioners (except physicians)
 - a. While the qualitative assessment revealed four (4) offices of mental health practitioners (except physicians). The Canadian market shows one (1) mental health professional per 2,200 citizens thus suggesting there would be market in Dryden for at least two (2) or more such professional considering the attraction radius population.
 - b. Emanating from Dryden's 2022 Community Capacity Study, it was identified not having an overarching mental health plan in place which could address root causes would lead to increased demand for mental health support services. Furthermore, the absence of a mental health plan has a direct impact on other community services (such as policing, social workers, etc.).

16. Offices of physical, occupational, and speech therapists and audiologists
 - a. While the qualitative assessment revealed two (2) offices of physical, occupational, and speech therapists and audiologists.
 - b. If a large economic development project were to take place within or in proximity to Dryden, leading to an influx of new residents, this would lead to increasing pressure on the existing physical, occupational, and speech therapy and audiology services currently offered. These offices would have to either consider expanding their service offering or additional offices of physical, occupational, and speech therapists and audiologists would need to be attracted to the city.
 - c. The quantitative assessment revealed that Winnipeg has 214 businesses without and 91 with employees, Kenora has two (2) businesses without employees, and that Thunder Bay has 28 businesses without and ten (10) with employees.
17. Offices of all other health practitioners
 - a. While the qualitative assessment revealed one (1) office classified as an office of all other health practitioners. The Canadian market shows 92,000 such practitioner's representing 24 physicians per 10,000 population thus suggesting there would be large market in Dryden.
18. Medical and diagnostic laboratories
 - a. While the qualitative assessment revealed two (2) facilities operating as medical and diagnostic laboratories. Other examples could include bacteriological laboratories, blood analysis laboratories, dental laboratories, testing laboratories (medical, analytic or diagnostic) or urinalysis laboratories.
 - b. The quantitative assessment revealed that Winnipeg has 52 businesses without and 92 with employees, Kenora has one (1) business with employees, and that Thunder Bay has four (4) businesses without and eight (8) with employees.

1.4.3.3 Supporting existing and aspiring retailers

Identified through the various stakeholder engagement activities and in consultation with City staff, it was noted that there are a number of individuals throughout the city who have a home-based business as either their primary or secondary source of income.

It was suggested that a business incubator has the potential to help educate, coach and support these entrepreneurs (with tools and services) with the goal of further developing these home-based business endeavours to a point where they would ultimately require dedicated commercial space as a result of outgrowing their home-based setting or a dedicated space would be a more appropriate place to conduct business and meet with prospective clients/customers. Such an incubator could also support industrial and technology start-up.

In working with its merchants, the City of Dryden could also evaluate the opportunity to create a Business Improvement Area that allows local businesspeople and commercial property owners and tenants to join together and, with the support of the municipality, to organize, finance, and carry out physical improvements and promote economic development in their district.

Traditionally, a BIA is a body established by a municipality using the specific business improvement area provisions in the Municipal Act, 2001. It is governed by a board of management. In this handbook, the term traditional BIA is used to generally describe such a body.

Business and property owners or others can request that a BIA be designated by a municipal bylaw. BIAs are local entities. The legislation states they are local boards. People also refer to the geographic area designated by a municipality for a BIA as the BIA.

BIA membership and funding

Once a traditional BIA is approved by municipal council, businesses within its boundaries become members and pay the BIA levy along with their property taxes. A traditional BIA view is that this structure reflects the principle that all who benefit should be required to bear their fair share of the cost of the program. In addition, the arrangement provides a secure source of funding for BIA activities.

In addition, many BIAs undertake modest or extensive public and private fundraising to raise funds for special events or activities.

Functions of a BIA

The general functions of a traditional BIA are to:

- Oversee the improvement, beautification and maintenance of municipally-owned land, buildings and structures in the area beyond that provided at the expense of the municipality generally;
- Promote the area as a business or shopping area;
- Maintain business improvement area-initiated streetscaping and capital assets within the business improvement area;
- Offer graffiti and poster removal services respecting building facades visible from the street, to all member property owners who provide written consent, upon approval of the program by the general membership of the business improvement area;
- Undertake safety and security initiatives within the business improvement area;
- Undertake strategic planning necessary to address business improvement area issues;
- Advocate on behalf of the interests of the business improvement area;
- Support retailers with training program; and
- Help retailers with business management coaching.

1.4.3.4 Local Impacts

Dryden residents and businesses can benefit from having a strong and diverse offering of professional and health care related service offerings throughout the city as there are many impacts which can be felt locally.

Local impacts associated within an increased number and variety of professional, scientific and technical services include:

- Minimizing project delays as a small number of existing service providers may no longer be required to service a high number of simultaneous clients;
- Increased competition we can lead to additional cost savings to the client;
- Making the city a more attractive location for resident and business investment attraction;
- Local job creation;
- Increasing property tax revenue generation for the City; and
- Retaining skilled talent locally;

Local impacts associated within an increased number and variety of ambulatory health care services include:

- Keeping individuals and families in better health by taking into account their environment and social conditions;
- Helping children and adults return to the classroom and workplace in a timelier manner;
- Easing travel constraints with those dealing with mobility constraints or lack of transportation who traditionally had to seek health care services outside of the city;
- Contributing towards the welfare of the entire population, ensures its security and protects it from the spread of infectious disease and environmental hazards, and helps to ensure access to safe and quality care to benefit the population;
- Early identification and treatment of life-threatening illness and disease;
- Reducing mental stress which can occur for those unable to access or obtain the medical attention they require;
- Making the city a more attractive location for resident and business investment attraction;
- Local job creation;
- Increasing property tax revenue generation for the City; and
- Retaining skilled talent locally;

1.4.3.5 Summary

It will remain important for the City to maintain awareness of the balance of market saturation (local competition) that's happening locally. This will contribute to ensuring that existing businesses remain profitable and open for business. This will become increasingly important as the city continues to grow and demand for these (and other) professional business services expands with that population growth.

As the City continues to work alongside and support small and large economic development projects (now and into the future), those efforts will provide the City with insights and valuable information to

inform their planning and growth efforts, while also setting current expectations with investors and developers.

Through local business retention and expansion efforts, it will become increasingly obvious which businesses and professional services are at capacity or ready to take on more work. This will help to inform business investment attraction strategies (and efforts) while also accommodating those who are proactively seeking (and targeting) growth opportunities in the city (from elsewhere in the province or abroad).

From the perspective of having the right number and mix of private or group professional health care services carries significant value to not only local residents, but also to businesses and the City itself. To support some of the recommendations (tied to healthcare and wellness) that are contained within Dryden's 2022 Community Capacity Study, a number of organizations that have been identified within the support group of "Health Services" will be able to contribute by conveying key information regarding pressure points that healthcare services within Dryden may be experiencing. Furthermore, it will be imperative that the voice of local citizens have a continued opportunity to express their healthcare needs and expectations which can support the City's business retention, expansion and business investment attraction efforts. The City must also continue to participate in dialogue with large economic development projects to help inform the City's planning and growth efforts with their health services partners.

1.4.4 Hotel Gap Analysis

1.4.4.1 Market Trends

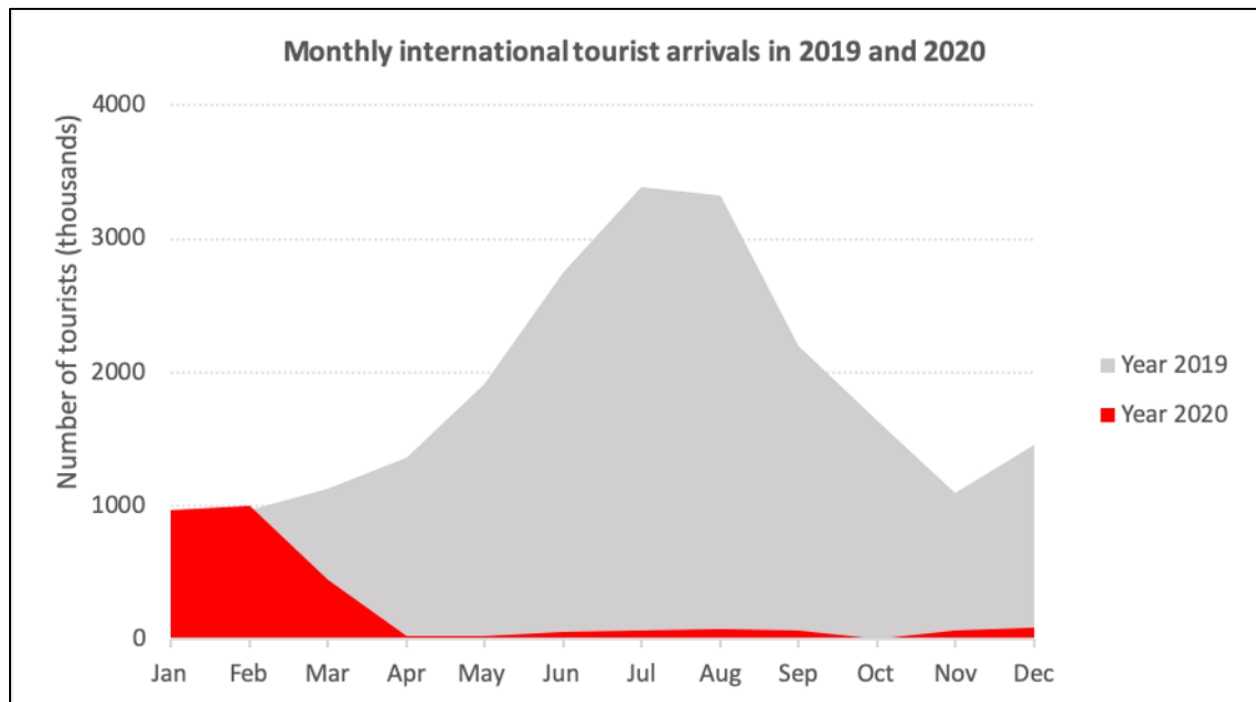
Since early 2019, the global tourism industry has sustained one of its biggest losses as a result of the COVID-19 pandemic. With the cancellation of many flights, cruises, trips, festivals, and events, those businesses that participate in and/or supporting the tourism industry were left scrambling.

With the emergence of approved vaccines, international borders have been reopening and many of the national and provincial physical distancing and health measures have allowed for more travel and in-person activity, however, new variants around the world are showing us that these new (and evolving) health restrictions may become the new norm.

In Canada, the impact on international travel due to the COVID-19 pandemic was immediate. With a decrease of 614,000 international arrivals to Canada in March 2020, this drop represented a 92% decrease over 2019¹⁷. Figure 17 illustrates the change in monthly international tourist arrivals to Canada in 2019 and 2020. Anecdotally, many businesses have been experiencing increases in international and domestic tourism activity as the economy has begun to rebound in 2021, however, these annualized figures are not yet published.

¹⁷ <https://theconversation.com/the-covid-19-pandemic-has-created-regional-tourism-hotspots-as-big-cities-suffer-159892>

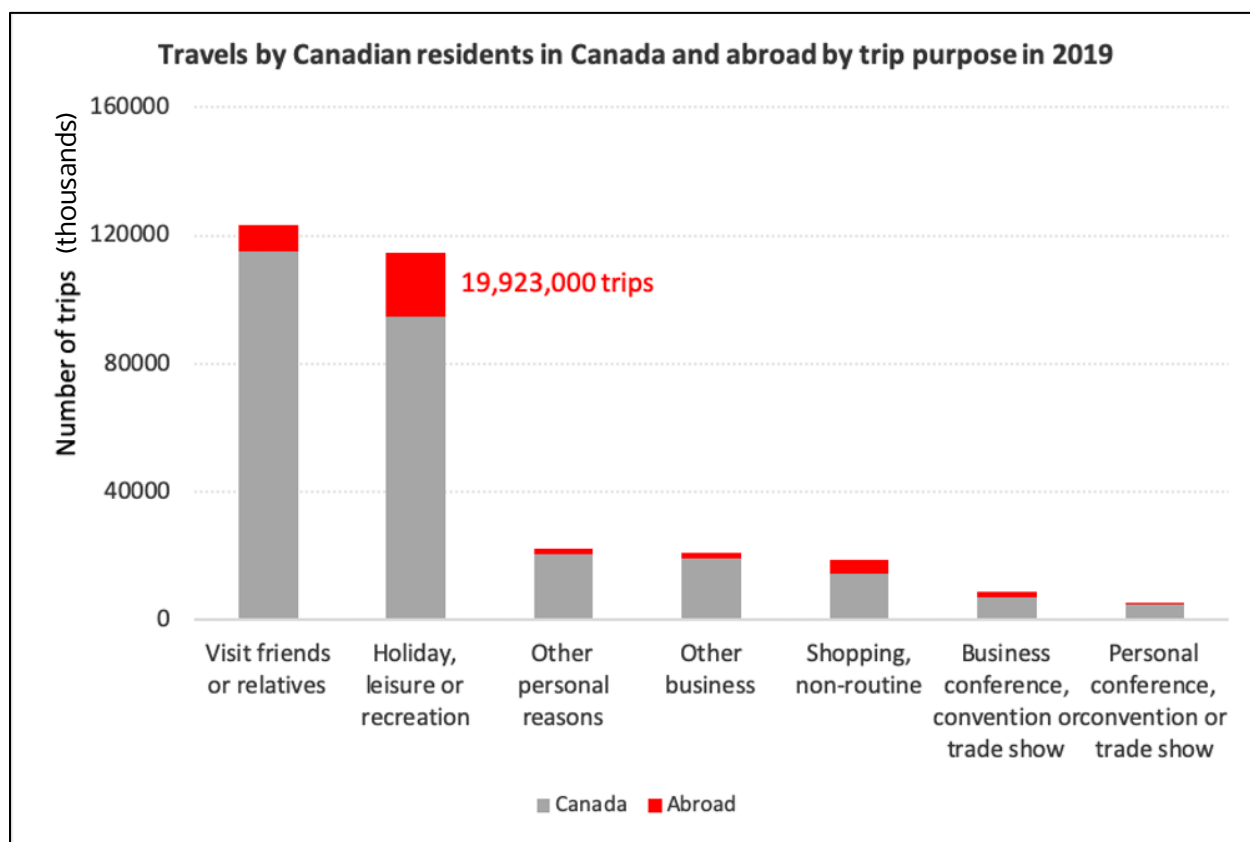
Figure 17 - Monthly International Tourist Arrivals to Canada in 2019 and 2020



For much of 2020, international borders to the US were closed for non-essential travel and much of Europe and other parts of the world were also struggling to cope with their own pandemic outbreaks, closures and stay-at-home orders. As a result, travel restrictions played a role in shifting upwards of 20 million holiday and leisure trips abroad by Canadian residents to domestic destinations¹⁸. Figure 18 shows the number of domestic and international trips made by Canadian residents in 2019. Of the approximate 115 million trips made by Canadians for holiday, leisure or recreation purposes, 19.9 million were to international destinations (representing 17.3%).

¹⁸ <https://theconversation.com/the-covid-19-pandemic-has-created-regional-tourism-hotspots-as-big-cities-suffer-159892>

Figure 18 - Travels by Canadian Residents in Canada and Abroad by Trip Purpose, 2019



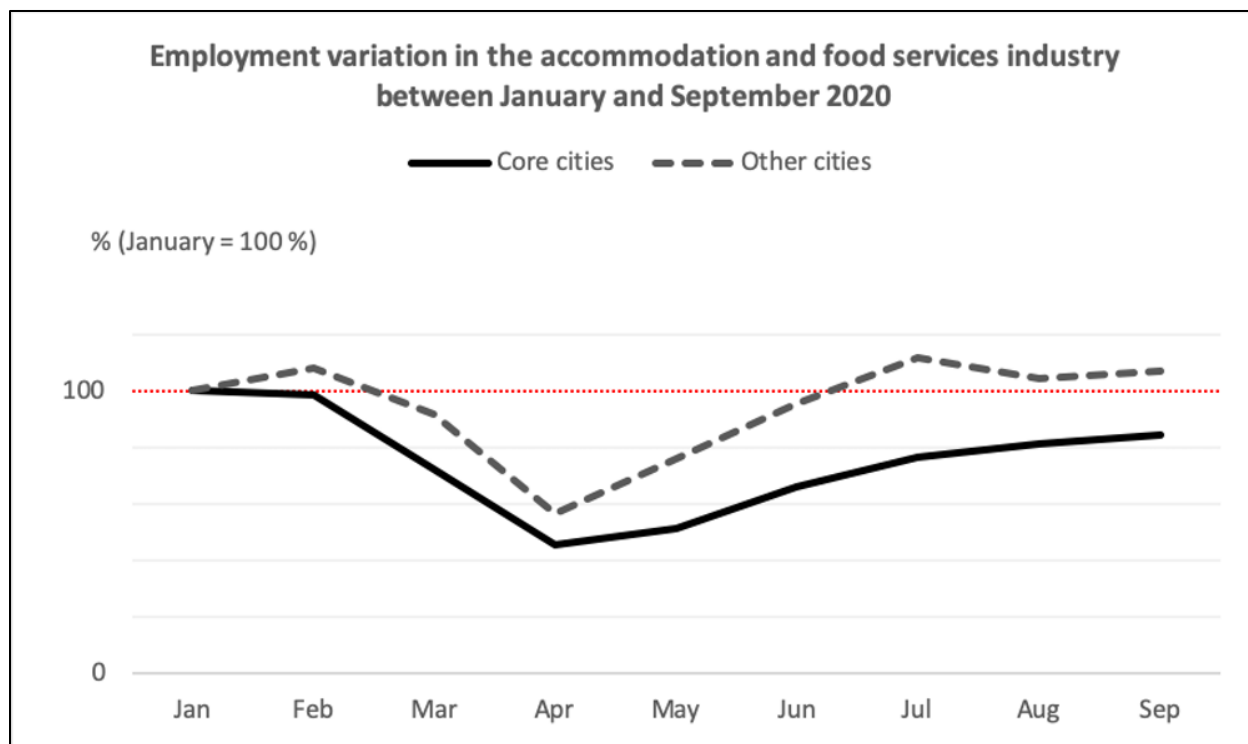
Primarily attributed to restrictions on international travel, the shift towards domestic tourism saw total tourism expenditures increase from 78.4% in 2019 to 92.7% in 2020¹⁹, however, the tourism spending in Canada (by both Canadian and international tourists) dipped 50% between 2019 and 2020.

While the tourism industry is responding (and being affected) in different ways, so too is the tourism industry in metropolitan centres compared with smaller neighbouring cities and more remote locations. Larger cities such as Toronto, Montreal and Vancouver, which are highly sought after tourism destinations for international tourism with their events, festivals, attractions, conventions and business conferences, saw the biggest drops in tourist activity. The number of international visitors to Montréal in 2020 decreased by 94% compared to 2019 and the city experienced its lowest hotel occupancy rate ever of around 15%. In Ottawa, hotel occupancy rates fell by 70% during the pandemic and the tourism sector lost almost half of the revenue generated in 2019. On the contrary, several smaller (and even remote) destinations benefited from an increase in domestic tourism. In some cases, these smaller communities were overwhelmed by the spike in tourism activity and often struggled to manage the sudden influx of tourists while continuing to be mindful of the local environment and quality of life of its permanent

¹⁹ <https://www.lapresse.ca/voyage/quebec-et-canada/2021-03-31/chute-de-pres-de-50-des-depenses-touristiques-au-canada.php>

residents. As an indicator of the increased activity in these outlying areas, Figure 19 presents the variation in the employment of the accommodation and food services industry between “core cities” and “other cities” throughout January and September 2020. While both regions experienced similar changes in employment patterns, the category of “other cities” was less impacted (as shown in the first quarter of 2020) and rebounded faster and stronger (as shown in the second quarter of 2020) before stabilizing in the third quarter over its comparative “core cities”.

Figure 19 - Employment Variation in the Accommodation and Food Services Industry (January - September 2020)



In Northern Ontario and prior to the pandemic, its tourism industry was greater than that of five (5) provinces (Manitoba, Saskatchewan and the Atlantic provinces) and the three (3) territories with its 8.2 million visitors and 1.6 billion dollars that were injected annually into the economy. Additionally, 90% of the economic benefits of tourism in Northern Ontario remained in the region ²⁰. Rural occupancy rates and revenue for Northern Ontario accommodations increased 15% and 28% year-over-year respectively in 2017 and the tourism industry was the largest employer of young workers in Northern Ontario.

Building upon the growing interest in domestic tourism, Northern Ontario communities and operators are continuing to benefit from the growing demand for overnight accommodations. Increased occupancy

²⁰ https://destinationnorthernontario.ca/an-update-for-the-northern-ontario-tourism-industry/?utm_source=sootoday.com&utm_campaign=sootoday.com&utm_medium=referral

can present challenges for travellers looking to secure accommodations for unplanned stays or late-season rentals. This is good news for both hotel and resort operators and a healthy sign of growth for the north's tourism industry as a whole.²¹ Fewer rooms mean more opportunities for growth in the accommodation sector. Rebecca Godfrey, Director and assistant practice lead with CBRE's Tourism & Leisure group in Canada, indicated that "demand for accommodations in Region 13 (which the City of Dryden is part of) has increased by 31% over the last five (5) years, at a compound rate of almost 7%."

While occupancy levels in Northern Ontario as a whole have traditionally remained in the high 50% range, with demand up 4% and occupancy at just under 63%, CBRE expects a two or three-point increase for Region 13 by the end of 2021.

While the supply of fixed-roof accommodations in Region 13 is not able to meet demand many times throughout the year, there remains the opportunity for new investment and business expansion to help fill this growing gap in Northern Ontario's tourism industry.

While today's industry is showing strong signs of optimism, hotel operators have to deal with labour shortages; low levels of business travel; having to integrate, adapt and rely more on technology (which poses cyber risk concerns); compliance with stringent indoor mask mandates in many areas; and vaccine mandates in many provinces have added a level of complexity to reopening restaurants, requiring employers to train workers to deal with frustrated customers.

Looking forward into 2022 and beyond, a number of changes are expected to influence the hotel and accommodation industry,²² including:

1. The industry will offer higher pay, improved benefits and better working conditions. Approximately 250,000 workers in Canada who used to work in food and accommodation had found a new line of work outside of that sector.²³ While hotel operators may have experienced a lesser degree of shock to its workforce (than the food services industry), hotels have had to cut back on housekeeping services and have begun to incorporate technology, such as with the use of apps to allow guests to meet their needs with a self-serve option. To aid hotel operators in attracting and retaining a reliable workforce, many will be forced to offer higher wages, improved benefits and provide better working conditions. This comes on the coattails of what many in the restaurant industry have also been responding to in a similar manner. Having commenced January 1st, 2022, the minimum wage in Ontario increased to \$15.00 per hour.

²¹ <https://www.sootoday.com/spotlight/spotlight-occupancy-rate-trends-mean-bigger-business-opportunities-in-the-north-1188892>

²² <https://www.hubinternational.com/insights/outlook-2022/hospitality/>

²³ <https://monitormag.ca/articles/tipping-point-pandemic-forced-restaurant-and-bar-workers-into-better-paying-jobs-2>

2. Technology deployment – and cyber risk – will increase. Technology is already widely utilized by hotel operators from facilitating online booking reservations, completing debit/credit card transaction, staff scheduling, guest Wi-Fi access, inventory management and automated telephone systems to name a few. As fraudsters in Canada shift focus to travel and leisure,²⁴ online fraud rose 216% year-over-year in Canadian travel and leisure businesses. As a result, hotel operators are going to have to better train and educate employees and to implement firewalls to prevent malware, phishing and other cybercrimes.
3. Hotels will need business travellers to recover completely. With business conferences and events moving virtual and cross-border travel having been limited to essential services, hotels have seen a significant drop-in business travel activity. To assist hotel operators in rebuilding this segment of their clientele, hotel operators must begin to explore ways to keep all related activities within their facilities by focusing on such amenities as boardroom and event space, hosting corporate dinners within their onsite restaurant and by offering additional business service (such as internet-enabled computer access and printing, video conferencing, whiteboards, etc.). Hotel operators should also begin to promote local tourism to the business traveller through the creation of add-on packages as a way to extend their stay.
4. Climate change-driven weather events will affect hospitality operations. Extreme weather events are on the rise throughout Canada and can wreak havoc on events, outdoor tourism attractions and modes of travel. Extreme weather disrupts operations, raises costs and reduces leisure travel and tourism. Extreme heat and drought add to wildfire risks, and halfway through 2021, the wildfire season was the worst since 2017. That's not to mention the damage brought on by other natural disasters. Today, catastrophe (CAT) modelling is also an important part of risk management, as it helps identify where weather-related catastrophes are most likely to occur. Leveraging CAT modelling can help hospitality businesses tell a compelling risk management story to underwriters.²⁵

²⁴ <https://www.globenewswire.com/en/news-release/2021/09/08/2293150/0/en/Fraudsters-in-Canada-Shift-Focus-to-Travel-and-Leisure.html>

²⁵ <https://www.hubinternational.com/insights/outlook-2022/hospitality/>

1.4.4.2 Supply Assessment

Within Region 13c, there were 1,001 recorded accommodation establishments in 2020 as presented in Table 12 and from this list, 197 were identified as roofed commercial accommodations which includes hotels and/or motels.

Table 12 - Number of Accommodations by Type in Region 13c (2020)

Accommodation Type	Quantity
Hotels	76
Motels	85
Motor Hotels	36
Resorts	84
Casino Hotels	0
Bed and Breakfast	12
Housekeeping Cottages and Cabins	89
All Other Traveller Accommodation	25
RV (Recreational Vehicle) Parks and Campgrounds	54
Hunting and Fishing Camps	480
Recreational (except Hunting and Fishing) and Vacation Camps	60

To further support the Supply Assessment, an evaluation of the quantitative results contained within the Canadian Business Register Repository was cross referenced using a qualitative approach as presented in Table 13. The qualitative approach not only allowed for the assigning of business names to the quantitative assessment, it also compared the number of such businesses which exist in Dryden to other key comparable cities. While the insights derived for the complete quantitative assessment provides valuable insights to the City and existing accommodation operators, the emphasis of the data contained within this table is on the commercial roofed accommodation providers (hotels, motor hotels and motels). The quantitative assessment revealed four (4) hotels, one (1) motor hotel and six (6) motels within the City of Dryden.

Table 13 - Qualitative vs. Quantitative Assessment of Dryden’s Accommodation Businesses

NAICS Code	NAICS Description	Winnipeg		Kenora		Dryden		Thunder Bay		Dryden Qualitative Assessment
		Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	
721111	Hotels	42	83	2	7	1	1	3	15	Best Western Plus Dryden Hotel & Conference Centre Comfort Inn Holiday Inn Express Dryden The Riverview Lodge
721112	Motor hotels	1	14	-	3	-	1	1	6	Kowality Motor Inn
721113	Resorts	1	4	4	3	-	-	3	2	n/a
721114	Motels	6	11	-	2	1	5	7	7	Chalet Inn Motel & Restaurant Evening Star Motel Hide Away Patricia Inn Timberland Motel Town & Country Motel
721120	Casino hotels	-	-	-	-	-	-	-	-	n/a
721191	Bed and breakfast	9	1	-	-	-	-	-	-	n/a
721192	Housekeeping cottages and cabins	1	-	5	3	-	1	1	3	Unverifiable *
721198	All other traveller accommodation	7	1	-	-	1	2	-	-	Unverifiable *
721211	Recreational vehicle (RV) parks and campgrounds	9	-	2	-	1	-	1	-	Aaron Park Birchland RV Park & Golf Bonny Bay Camp & RV Park

NAICS Code	NAICS Description	Winnipeg		Kenora		Dryden		Thunder Bay		Dryden Qualitative Assessment
		Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	Without Employees	With Employees	
										Indian Point Camp Nature's Inn Tent & RV Park Northwestern Tent & RV Park
721212	Hunting and fishing camps	8	6	13	9	11	4	7	8	Bonny Bay Camp & RV Park Indian Point Camp
721213	Recreational (except hunting and fishing) and vacation camps	8	4	3	3	3	-	2	-	Unverifiable *
721310	Rooming and boarding houses	6	9	-	-	-	-	-	1	n/a

* The research team was unable to identify and/or verify (from a qualitative approach) and in consultation with City of Dryden staff the names of the local businesses which were indicative of having a business establishment (either without or with employees) within the City of Dryden as contained within the Canadian Business Register Repository.

Within the City of Dryden, there are ten (10) establishments that fall within the NAICS industry classification 72111, which are defined as hotels (except casino hotels) and motels. Those ten (10) businesses have a combined number of 364 rooms and are broken out as follows:

- Best Western Plus Dryden Hotel & Conference Centre (89 rooms) ²⁶
- Comfort Inn (61 rooms) ²⁷
- Holiday Inn Express Dryden (60 rooms) ²⁸
- Town & Country Motel (37 rooms) ²⁹
- Chalet Inn Motel & Restaurant (30 rooms) ³⁰
- Timberland Motel (24 rooms) ³¹
- Hide Away (13 rooms) ³²
- The Riverview Lodge (12 rooms) ³³
- Evening Star Motel (8 rooms)
- Kowality Motor Inn (30 rooms) ³⁴

If those ten (10) accommodations establishments in Dryden represent 4.57% of the 197 hotels and motels situated throughout Region 13c and apply that same percentage to estimate the approximate number of combined hotel/motel rooms in all of Region 13c, we can estimate that there are approximately 7,970 available rooms.

Over the course of a year, those 364 rooms in Dryden have a capacity of 132,860 overnight stays. Similarly in Region 13c, those 7,970 rooms equate to 2,909,050 overnight stays per year.

1.4.4.3 Demand Assessment

Region 13c, in 2019, hosted 1,249,991 person visits, equal to approximately 875,631 household/party visits. Of particular note, 498,874 (39.9%) were identified as day trips and the remaining 751,118 person visits included one (1) or more nights accommodation in their travels. Table 14 breaks down the number of overnight stays by duration of trip. It is noted that the majority of visitors to the area (30.5%) remained in Region 13c for ten (10) or more nights, followed by 20.5% staying 6-9 nights and 16% having booked a two (2) night getaway.

²⁶ <https://www.trip.com/hotels/dryden-hotel-detail-2219587/best-western-plus-dryden-hotel-and-conference-centre>

²⁷ <https://www.trip.com/hotels/dryden-hotel-detail-3063500/comfort-inn-dryden>

²⁸ <https://www.trip.com/hotels/dryden-hotel-detail-2216713/holiday-inn-express-dryden-an-ihg-hotel>

²⁹ <http://www.townandcountrymotel.ca/accommodations.html>

³⁰ <https://www.trip.com/hotels/dryden-hotel-detail-10003061/chalet-inn-motel>

³¹ <https://www.trip.com/hotels/dryden-hotel-detail-9906460/timberland-motel>

³² <https://www.trip.com/hotels/dryden-hotel-detail-9837129/hide-away-inn>

³³ <https://www.trip.com/hotels/dryden-hotel-detail-9423671/riverview-lodge>

³⁴ Confirmed by telephone with hotel directly.

Table 14 - Estimated Number of Overnight Stays in Region 13c

Duration	No. of Person Visits	No. of Nights	Percent of All Visits
1 night	260,217	260,217	9.8%
2 nights	211,775	423,550	16.0%
3 nights	69,953	209,859	7.9%
4 nights	76,915	307,660	11.6%
5 nights	19,497	97,485	3.7%
6 - 9 nights (~8)	67,810	542,480	20.5%
10+ nights (~18)	44,951	809,118	30.5%
	751,118	2,650,369	100.00%

* An estimate of 8 nights was used to calculate number of nights in the range of 6-9 nights and an estimate of 18 nights was used for trips lasting 10+ days in duration.

While the estimated number of overnight stays reported in Table 14 was 2.65 million, tourism data from the Region 13c Tourism Profile indicated approximately 2.747 million overnight stays (representing a variance of 3.7%). Region 13c Tourism Profile data reported an average overnight stay of 3.66 nights.³⁵

Table 15 - Occupancy Rate for Region 13c Accommodation Establishments

Year	Occupancy Rate
2008	68.2%
2009	66.1%
2010	69.8%
2011	69.8%
2012	66.4%
2013	65.0%
2014	65.5%
2015	65.6%
2016	66.7%
2017	69.8%
2018	70.7%
2019	69.5%
2020	52.9%

The occupancy rate for Region 13c accommodation establishments is presented in Table 15. These figures represent the average occupancy rate for all types of accommodation establishments including hotels, motels, Bed & Breakfasts, hunting/fishing camps, cabins, among others. Between 2013 and 2018, there was a growing occupancy rate, but experienced a slight decline in 2019 prior to the pandemic, followed by a significant drop in 2020.

Throughout 2019, Region 13c saw its visits fluctuate throughout the year. Of the 1.249-million-person visits, 11% took place between January-March, 29% between April-June, 47% during July-September and 14% between October-December. As a result, hotel-motel operators would most likely experience capacity constraints during the July-September period, followed by April-June.

Based on accommodation type, approximately 279,176 overnight stays took place at roofed commercial accommodations, representing 40.9% of all overnight stays in 2019, regardless of accommodation type. Therefore, if 40.9% of the 2.747 million overnight stays (representing 1,123,924) took place at roofed commercial accommodations throughout region 13c, this means that the annualized occupancy rate for roofed commercial accommodations was approximately 38.6%. This figure does not provide insight into the spike in occupancy rates during peak months throughout the season.

³⁵ 751,118 visits to Region 13c with an average overnight stay of 3.66 days is equal to 2.749 million room rentals.

Despite this lower than Region 13c average annual occupancy rate, feedback from the General Public Online Survey indicated that 92 of the 1,047 votes received (representing 8.79%), that there was a need for more overnight accommodations in order to make the city more attractive and resilient when considering the types of commercial business activity that should be attracted to the city. This perception of limited overnight capacity may be exacerbated during the peak seasons when the city is at the height of its business and leisure travel to the area. A sampling of the individual comments expressed, indicate:

“Dryden could easily support another hotel and restaurant. It’s very challenging to find hotel rooms in Dryden.”

“There are times when all hotels are full and it is impossible to find a room - we could definitely use another hotel.”

“We need more waterside attractions; it would be nice to have a restaurant down by the government dock or a hotel/restaurant combo.”

“The City should try to attract a couple more hotels and restaurants to the community. While Dryden is largely well served here, being on the Trans-Canada and exactly halfway between Winnipeg and Thunder Bay, I believe this market would not saturate with more options. Our hotels are often quite busy with through travellers and during highway closures this is especially apparent.”

1.4.4.1 Local Impacts

Dryden residents can benefit from having a strong and diverse food and beverage offering throughout the city as there are many impacts which can be felt locally, including:

Local Impacts of Attracting New Accommodation Businesses to the City:

- Support the City’s business retention and expansion priorities;
- Helps to retain jobs within the city;
- Helps to keep overnight visitors in the city, and
- Helps to keep consumer spending in the city.

Local impacts of expanding accommodation businesses:

- Increases variety of overnight accommodation options for visitors;
- Increases capacity to accommodate more overnight visitors;
- Increases City revenues through property taxes;
- Creates additional incentive / opportunity to draw transient visitors off Highway 17 into the city;

- Consumer spending remains within the local economy;
- Local job creation; and
- Stimulate local economy.

1.4.4.2 Summary

While the city continues to benefit as a northern Ontario tourism destination, it also acts as a commercial hub for those in outlying areas and others who are travelling across northern Ontario (or parts of Canada) for which Highway 17 intersects the city. On average close to 9 million people visit northwest Ontario annually. Hotel occupancy rates have been up year over year and ranged in the 65% average. This statistic means that nicer quality location will have rate above 80% quite often and no vacation a fair portion of each season. No local statistics were available but room shortage seem to be a situation impacting the town repeatedly thus suggesting a gap to be filled.

The Municipal Accommodation Tax program now enters its third year and the City may want to consider including the collection of room occupancy from each participating hotel as a way to support strategic planning efforts tied to tourism and overnight accommodation while also providing aggregated information back to the hotel operators which can also support their business planning efforts as well.

As the Province continues to provide aggregated tourism and visitor information for Region 13c, it will be important for the City to take responsibility for tracking tourist and visitor information at a local level.

By reviewing and quantifying the demand for various types of overnight accommodations within Dryden, the City can:

- Assist with business retention and expansion of local accommodation providers;
- Support business investment attraction efforts of attracting a new accommodation provider to the city; and
- Assist tourism operators and agencies in the promotion of events and activities.

Furthermore, localized data regarding demand for various overnight accommodations within Dryden will be beneficial to existing operators and will support the business case for any prospective investor considering the establishment of a new accommodation-type facility within Dryden. Much tourism-related information within Region 13C is provided at a high-level, so having more localized/granular data will allow existing operators, prospective investors and the City make more informed decisions.

2. Gaps

2.1 Summary of Gaps

The following list represents the prevailing gaps emanating from section 1.4 - Retail-Commercial Gap Analysis. Some of these gaps will become more apparent should a large economic development project proceed within or in proximity to the city.

1. The city lacks a multi-use entertainment facility capable of including a movie theatre, family entertain (such as amusement arcades), a full-service (or limited-service) restaurant, and/or a brewery.
2. There is a need for a sporting goods store with key departments that focus on cycling, skiing, outdoor equipment/clothing, amongst others.
3. The city does not have a rental operator of outdoor recreational land and marine vehicles.
4. There is a shortage in the number and variety of “hobby, toy and game stores” in the city.
5. There is a need to expand the number of “drinking places (alcoholic beverages)” within the city.
6. There is a need to increase the number of short- and long-term accommodations within the city to address the limited capacity during certain times throughout the year.
7. There is a need to expand some categories of professional service offering (such as professional, scientific and technical services, and ambulatory health care services)
8. There is a need to establish a business incubator with an emphasis on supporting the retail/service sector

2.2 Prioritization of Gaps

To assess and prioritize the recommendations contained within section 2.1, Table 16 presents the summarized results of an evaluation matrix of all proposed recommendations. Each recommendation contained a series of criteria for which they were individually ranked on a scale of 1-10. These criteria included City staff resources (time), City staff resources (financial), time sensitivity to commence the project, available workforce today to support the project, and the overall ability of the project to the impact the local economy.

The top six (6) recommendations emanating from the evaluation matrix are:

1. Attract a sporting goods store. Sub-components could include cycling, skiing, outdoor equipment / clothing to the city.
2. Attract more accommodation businesses to the city.
3. Attract additional full-service restaurants and drinking places (alcoholic beverages) to the city.
4. Attraction a recreational vehicle dealer to the city.
5. Attract a multi-use entertainment facility which includes a movie theatre and family entertainment (such as amusement arcade) activities to the city.
6. Attract a rental operator of outdoor recreational land and marine vehicles to the city.

A detailed breakdown of each recommendation, including the weighing of each criterion is available in Appendix 2 - Detailed Evaluation Matrix of all Proposed .

Table 16 - Evaluation Matrix of all Proposed Gaps

Overall Rank	Overall Score	Activity
1	46	Attract a sporting goods store. Sub-components could include cycling, skiing, outdoor equipment / clothing to the city.
2	45	Attract more accommodation businesses to the city.
3	45	Attract additional full-service restaurant and drinking places (alcoholic beverages) to the city.
4	45	Attract a recreational vehicle dealer.
5	43	Attract a multi-use entertainment facility which includes a movie theatre, amusement arcades, a full-service (or limited-service) restaurant, and/or a brewery to the city.
6	41	Attract a rental operator of outdoor recreational land and marine vehicles to the city.
7	39	Identify expanding accommodation businesses and assist in their growth plans.
8	36	Encourage the existing Farmers' Market to evaluate the feasibility of expanding service year-round or attract a year-round operator to the city.
9	34	Assess the feasibility to establish a business incubator with an emphasis on supporting the retail/service sector.
10	33	Expand "hobby, toy and game stores" in the city.
11	27	Review and quantify the demand for various types of overnight accommodations within Dryden.
12	25	Attract "clothing accessories store(s)" to the city.

Appendix 1 – Classification of Dryden’s Retail Businesses by Employee Size

Business Categories by 6-digit NAICS with 100+ Employees

The following 6-digit NAICS categories include at least one (1) business that employs 100 or more employees in the City of Dryden. As shown in Table 17, there are two (2) supermarkets in Dryden, one (1) of which has more than 100 employees while the other has 20-49 employees. A department store in Dryden also employs more than 100 people.

Table 17 - Business Categories by 6-digit NAICS with 100+ Employees

Business Categories by 6-digit NAICS Industry	Total	Number of Business Without Employees	Number of Business With Employees	Number of Business With ...							
				1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500 + Employees
445110 - Supermarkets and other grocery (except convenience) stores	2	0	2	0	0	0	1	0	1	0	0
452110 - Department stores	1	0	1	0	0	0	0	0	1	0	0

Business Categories by 6-digit NAICS with 50-99 Employees

The City of Dryden has three (3) automotive dealerships; one (1) of them has a workforce of 50 – 99 people and the other two (2) auto dealers employ 20-49 and 10-19 employees, respectively. A home and auto supplies store is also identified as having employed 50 – 99 people in Dryden.

Table 18 - Business Categories by 6-digit NAICS with 50-99 Employees

Business Categories by 6-digit NAICS Industry	Total	Number of Business Without Employees	Number of Business With Employees	Number of Business With ...							
				1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500 + Employees
441110 - New car dealers	3	0	3	0	0	1	1	1	0	0	0
452991 - Home and auto supplies stores	1	0	1	0	0	0	0	1	0	0	0

Business Categories by 6-digit NAICS with 20-49 Employees

The following business categories have at least one (1) business establishment in Dryden that employs 20-49 workers: Appliance, television and other electronics stores, Home centres, Pharmacies and drug stores, Other gasoline stations, Office supplies and stationery stores and Used merchandise stores.

Table 19 - Business Categories by 6-digit NAICS with 20-49 Employees

Business Categories by 6-digit NAICS Industry	Total	Number of Business Without Employees	Number of Business With Employees	Number of Business With ...							
				1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500 + Employees
443143 - Appliance, television and other electronics stores	1	0	1	0	0	0	1	0	0	0	0
444110 - Home centres	2	0	2	0	0	0	2	0	0	0	0
446110 - Pharmacies and drug stores	4	1	3	0	1	1	1	0	0	0	0
447190 - Other gasoline stations	8	4	4	2	0	1	1	0	0	0	0
453210 - Office supplies and stationery stores	2	1	1	0	0	0	1	0	0	0	0
453310 - Used merchandise stores	1	0	1	0	0	0	1	0	0	0	0

Business Categories by 6-digit NAICS with 10-19 Employees

There are eight (8) business categories that have at least one (1) business establishment in Dryden with 10-19 employees as shown in Table 20. Among the listed categories, Gasoline stations with convenience stores have the most business establishments (4) with an employee count of 10-19 people.

Table 20 - Business Categories by 6-digit NAICS with 10-19 Employees

Business Categories by 6-digit NAICS Industry	Total	Number of Business Without Employees	Number of Business With Employees	Number of Business With ...							
				1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500 + Employees
441320 - Tire dealers	1	0	1	0	0	1	0	0	0	0	0
442110 - Furniture stores	1	0	1	0	0	1	0	0	0	0	0
444220 - Nursery stores and garden centres	1	0	1	0	0	1	0	0	0	0	0
445310 - Beer, wine and liquor stores	2	0	2	0	0	2	0	0	0	0	0
446130 - Optical goods stores	1	0	1	0	0	1	0	0	0	0	0
446199 - All other health and personal care stores	2	0	2	1	0	1	0	0	0	0	0
447110 - Gasoline stations with convenience stores	9	2	7	3	0	4	0	0	0	0	0
448140 - Family clothing stores	4	0	4	0	3	1	0	0	0	0	0

Business Categories by 6-digit NAICS with 5-9 Employees

Table 21 presents the list of business categories that have at least one (1) business establishment in Dryden with 5-9 employees. Three (3) of the ten (10) categories listed below relate to automotive-type activities.

Table 21 - Business Categories by 6-digit NAICS with 5-9 Employees

Business Categories by 6-digit NAICS Industry	Total	Number of Business Without Employees	Number of Business With Employees	Number of Business With ...							
				1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500 + Employees
441120 - Used car dealers	1	0	1	0	1	0	0	0	0	0	0
441220 - Motorcycle, boat and other motor vehicle dealers	1	0	1	0	1	0	0	0	0	0	0
441310 - Automotive parts and accessories stores	2	1	1	0	1	0	0	0	0	0	0
445120 - Convenience stores	2	1	1	0	1	0	0	0	0	0	0
445299 - All other specialty food stores	3	0	3	0	3	0	0	0	0	0	0
448120 - Women's clothing stores	2	0	2	1	1	0	0	0	0	0	0
451119 - All other sporting goods stores	1	0	1	0	1	0	0	0	0	0	0
452999 - All other miscellaneous general merchandise stores	3	0	3	1	2	0	0	0	0	0	0
453110 - Florists	1	0	1	0	1	0	0	0	0	0	0
454312 - Liquefied petroleum gas (bottled gas) dealers	1	0	1	0	1	0	0	0	0	0	0

Business Categories by 6-digit NAICS with 1-4 Employees

The following business categories represent Dryden businesses with 1-4 employees. The majority of the categories presented below only comprise one (1) business establishment in the City of Dryden.

Table 22 - Business Categories by 6-digit NAICS with 1-4 Employees

Business Categories by 6-digit NAICS Industry	Total	Number of Business Without Employees	Number of Business With Employees	Number of Business With ...							
				1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500 + Employees
442210 - Floor covering stores	1	0	1	1	0	0	0	0	0	0	0
443145 - Camera and photographic supplies stores	1	0	1	1	0	0	0	0	0	0	0
446120 - Cosmetics, beauty supplies and perfume stores	1	0	1	1	0	0	0	0	0	0	0
448110 - Men's clothing stores	1	0	1	1	0	0	0	0	0	0	0
448210 - Shoe stores	1	0	1	1	0	0	0	0	0	0	0
448310 - Jewellery stores	2	1	1	1	0	0	0	0	0	0	0
451310 - Book stores and news dealers	1	0	1	1	0	0	0	0	0	0	0
453220 - Gift, novelty and souvenir stores	2	1	1	1	0	0	0	0	0	0	0
453992 - Beer and wine-making supplies stores	1	0	1	1	0	0	0	0	0	0	0
453993 - Cannabis stores	1	0	1	1	0	0	0	0	0	0	0

Business Categories by 6-digit NAICS without Employees

The business categories presented in Table 23 are 6-digit NAICS sub-industries that only have without-employees businesses in the City of Dryden. Those businesses are usually referred to as “owner-operated” or “sole-proprietor”.

Table 23 - Business Categories by 6-digit NAICS without Employees

Business Categories by 6-digit NAICS Industry	Total	Number of Business Without Employees	Number of Business With Employees	Number of Business With ...							
				1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees	50-99 Employees	100-199 Employees	200-499 Employees	500 + Employees
442291 - Window treatment stores	2	2	0	0	0	0	0	0	0	0	0
448130 - Children's and infants' clothing stores	1	1	0	0	0	0	0	0	0	0	0
448199 - All other clothing stores	2	2	0	0	0	0	0	0	0	0	0
451130 - Sewing, needlework and piece goods stores	1	1	0	0	0	0	0	0	0	0	0
453920 - Art dealers	1	1	0	0	0	0	0	0	0	0	0
453999 - All other miscellaneous store retailers (except beer and wine-making supplies stores)	1	1	0	0	0	0	0	0	0	0	0
454390 - Other direct selling establishments	1	1	0	0	0	0	0	0	0	0	0

Business Categories by 6-digit NAICS with No Physical Presence in Dryden

According to the 2020 Business Count data, the following list of business categories have no establishments (physical locations) in the City of Dryden. These business categories (in addition to other commercial business activities) have been further explored and vetted using the qualitative review in section 1.3.2.

Business Categories by 6-digit NAICS Industry	
441210 - Recreational vehicle dealers	451111 - Golf equipment and supplies specialty stores
442292 - Print and picture frame stores	451112 - Ski equipment and supplies specialty stores
442298 - All other home furnishings stores	451113 - Cycling equipment and supplies specialty stores
443144 - Computer and software stores	451120 - Hobby, toy and game stores
443146 - Audio and video recordings stores	451140 - Musical instrument and supplies stores
444120 - Paint and wallpaper stores	452910 - Warehouse clubs
444130 - Hardware stores	453910 - Pet and pet supplies stores
444190 - Other building material dealers	453930 - Mobile home dealers
444210 - Outdoor power equipment stores	454110 - Electronic shopping and mail-order houses
445210 - Meat markets	454210 - Vending machine operators
445220 - Fish and seafood markets	454311 - Heating oil dealers
445230 - Fruit and vegetable markets	454319 - Other fuel dealers
445291 - Baked goods stores	
445292 - Confectionery and nut stores	
446191 - Food (health) supplement stores	
448150 - Clothing accessories stores	
448191 - Fur stores	
448320 - Luggage and leather goods stores	

2.2.1.1.1 Finance and Insurance Industry

Among all the sub-industries in the Finance and Insurance sector, Real Estate (NAICS 531) has the highest number of businesses in Dryden (99 businesses, 87 without employees and 12 with employees). Securities and Financial Investment (NAICS 523) has 24 establishments in Dryden, with the majority of them (21 out of 24) being owner-operated businesses with no employees.

Table 24 - Dryden Finance and Insurance Industry Business Count, December 2020

NAICS Industry	Number of Business Without Employees	Number of Business with Employees	Total
522 - Credit intermediation and related activities	0	6	6
523 - Securities, commodity contracts, and other financial investment and related activities	21	3	24
524 - Insurance carriers and related activities	5	4	9
526 - Funds and other financial vehicles	0	0	0
531 - Real estate	87	12	99
532 - Rental and leasing services	5	2	7
Total	118	27	145

2.2.1.1.2 Accommodation and Food Services

In Dryden, there are 32 businesses providing accommodation services and 24 businesses providing food services. Eighteen (18) businesses in the Accommodation sub-industry are owner-operated with no employees, which could be the case for most Bed & Breakfast establishments. There were 14 accommodation businesses with employees in Dryden, including the motels, inns and hotels as listed in the previous section.

Table 25 - Dryden Accommodation and Food Services Business Count, December 2020

NAICS Industry	Number of Business Without Employees	Number of Business with Employees	Total
721 - Accommodation services	18	14	32
722 - Food services and drinking places	5	19	24
Total	23	33	56

2.2.1.2 Limitations of Data Collection

The quantitative Business Count Analysis is augmented by a Business Gap Analysis (supported by a qualitative review of the local business community) as one method for ensuring the accuracy of information.

It is worth noting that the Business Register Repository consists of various data sources from Canada Revenue Agency (CRA) files (i.e., T2, T1, GST, PD7 and T4 files), regional profiling (i.e., telephone or on-site interview), survey feedback and other Statistics Canada research. Therefore, businesses without a business registration number and businesses with local operations but are registered elsewhere are not captured by this dataset.

Furthermore, Statistics Canada categorizes business establishments by NAICS Code based on the concept of major business activity in a manner consistent with the approach outlined by the North American Industry Classification System (NAICS). The qualitative review (section 2.2.1.2) attempts to organize the multiple product/service offerings within a single business and assigns each business to the appropriate business category based on common knowledge of their business offering.

2.2.1.3 Commercial Business Directory

The City of Dryden, the Dryden Chamber of Commerce and CKDR (radio station) maintain an online business directory for commercial business in the City. The City of Dryden Business Directory is free to access and free for local businesses to list, however, the Chamber of Commerce Business Directory only lists member businesses.

Appendix 2 - Detailed Evaluation Matrix of all Proposed Recommendations

Activity	Factor	Rank	Overall Score
Encourage the existing Farmers' Market to evaluate the feasibility of expanding service year-round or attract a year-round operator to the city.	Staff Resources (time) - (1=High, 5=Moderate, 10=Low)	7	36
	Staff Resources (financial) - (1=High, 5=Moderate, 10=Low)	10	
	Time Sensitivity to Commence Project - (1=Low, 5=Moderate, 10=High)	2	
	Job Creation Potential - (1=<5, 10=25+)	4	
	Available Workforce Today to Support - (1=Low, 5=Moderate, 10=High)	7	
	Overall Ability to Impact Local Economy - (1=Low, 5=Moderate, 10=High)	6	
Attract "clothing accessories store(s)" to the city.	Staff Resources (time) - (1=High, 5=Moderate, 10=Low)	3	25
	Staff Resources (financial) - (1=High, 5=Moderate, 10=Low)	9	
	Time Sensitivity to Commence Project - (1=Low, 5=Moderate, 10=High)	1	
	Job Creation Potential - (1=<5, 10=25+)	2	
	Available Workforce Today to Support - (1=Low, 5=Moderate, 10=High)	8	
	Overall Ability to Impact Local Economy - (1=Low, 5=Moderate, 10=High)	2	
Attract a rental operator of outdoor recreational land and marine vehicles to the city.	Staff Resources (time) - (1=High, 5=Moderate, 10=Low)	3	41
	Staff Resources (financial) - (1=High, 5=Moderate, 10=Low)	9	
	Time Sensitivity to Commence Project - (1=Low, 5=Moderate, 10=High)	9	
	Job Creation Potential - (1=<5, 10=25+)	3	
	Available Workforce Today to Support - (1=Low, 5=Moderate, 10=High)	8	
	Overall Ability to Impact Local Economy - (1=Low, 5=Moderate, 10=High)	9	
Attract a multi-use entertainment facility which includes a movie theatre, amusement arcades, a full-service (or limited-service) restaurant, and/or a brewery to the city.	Staff Resources (time) - (1=High, 5=Moderate, 10=Low)	1	43
	Staff Resources (financial) - (1=High, 5=Moderate, 10=Low)	8	
	Time Sensitivity to Commence Project - (1=Low, 5=Moderate, 10=High)	8	
	Job Creation Potential - (1=<5, 10=25+)	10	
	Available Workforce Today to Support - (1=Low, 5=Moderate, 10=High)	8	
	Overall Ability to Impact Local Economy - (1=Low, 5=Moderate, 10=High)	8	

Activity	Factor	Rank	Overall Score
Attract a sporting goods store. Sub-components could include cycling, skiing, outdoor equipment / clothing to the city.	Staff Resources (time) - (1=High, 5=Moderate, 10=Low)	2	46
	Staff Resources (financial) - (1=High, 5=Moderate, 10=Low)	9	
	Time Sensitivity to Commence Project - (1=Low, 5=Moderate, 10=High)	8	
	Job Creation Potential - (1=<5, 10=25+)	10	
	Available Workforce Today to Support - (1=Low, 5=Moderate, 10=High)	9	
	Overall Ability to Impact Local Economy - (1=Low, 5=Moderate, 10=High)	8	
Expand “hobby, toy and game stores” in the city.	Staff Resources (time) - (1=High, 5=Moderate, 10=Low)	7	33
	Staff Resources (financial) - (1=High, 5=Moderate, 10=Low)	9	
	Time Sensitivity to Commence Project - (1=Low, 5=Moderate, 10=High)	2	
	Job Creation Potential - (1=<5, 10=25+)	2	
	Available Workforce Today to Support - (1=Low, 5=Moderate, 10=High)	7	
	Overall Ability to Impact Local Economy - (1=Low, 5=Moderate, 10=High)	6	
Attract additional “drinking places (alcoholic beverages)” to the city.	Staff Resources (time) - (1=High, 5=Moderate, 10=Low)	7	45
	Staff Resources (financial) - (1=High, 5=Moderate, 10=Low)	9	
	Time Sensitivity to Commence Project - (1=Low, 5=Moderate, 10=High)	7	
	Job Creation Potential - (1=<5, 10=25+)	8	
	Available Workforce Today to Support - (1=Low, 5=Moderate, 10=High)	7	
	Overall Ability to Impact Local Economy - (1=Low, 5=Moderate, 10=High)	7	
Identify expanding accommodation businesses and assist in their growth plans.	Staff Resources (time) - (1=High, 5=Moderate, 10=Low)	3	39
	Staff Resources (financial) - (1=High, 5=Moderate, 10=Low)	9	
	Time Sensitivity to Commence Project - (1=Low, 5=Moderate, 10=High)	7	
	Job Creation Potential - (1=<5, 10=25+)	4	
	Available Workforce Today to Support - (1=Low, 5=Moderate, 10=High)	8	
	Overall Ability to Impact Local Economy - (1=Low, 5=Moderate, 10=High)	8	

Activity	Factor	Rank	Overall Score
Attract more accommodation businesses to the city.	Staff Resources (time) - (1=High, 5=Moderate, 10=Low)	2	45
	Staff Resources (financial) - (1=High, 5=Moderate, 10=Low)	9	
	Time Sensitivity to Commence Project - (1=Low, 5=Moderate, 10=High)	7	
	Job Creation Potential - (1=<5, 10=25+)	10	
	Available Workforce Today to Support - (1=Low, 5=Moderate, 10=High)	8	
	Overall Ability to Impact Local Economy - (1=Low, 5=Moderate, 10=High)	9	
Review and quantify the demand for various types of overnight accommodations within Dryden.	Staff Resources (time) - (1=High, 5=Moderate, 10=Low)	2	27
	Staff Resources (financial) - (1=High, 5=Moderate, 10=Low)	10	
	Time Sensitivity to Commence Project - (1=Low, 5=Moderate, 10=High)	3	
	Job Creation Potential - (1=<5, 10=25+)	1	
	Available Workforce Today to Support - (1=Low, 5=Moderate, 10=High)	5	
	Overall Ability to Impact Local Economy - (1=Low, 5=Moderate, 10=High)	6	
Attract a recreational vehicle dealer.	Staff Resources (time) - (1=High, 5=Moderate, 10=Low)	3	45
	Staff Resources (financial) - (1=High, 5=Moderate, 10=Low)	9	
	Time Sensitivity to Commence Project - (1=Low, 5=Moderate, 10=High)	9	
	Job Creation Potential - (1=<5, 10=25+)	7	
	Available Workforce Today to Support - (1=Low, 5=Moderate, 10=High)	8	
	Overall Ability to Impact Local Economy - (1=Low, 5=Moderate, 10=High)	9	
Assess the feasibility to establish a business incubator with an emphasis on supporting the retail/service sector.	Staff Resources (time) - (1=High, 5=Moderate, 10=Low)	2	34
	Staff Resources (financial) - (1=High, 5=Moderate, 10=Low)	9	
	Time Sensitivity to Commence Project - (1=Low, 5=Moderate, 10=High)	8	
	Job Creation Potential - (1=<5, 10=25+)	4	
	Available Workforce Today to Support - (1=Low, 5=Moderate, 10=High)	2	
	Overall Ability to Impact Local Economy - (1=Low, 5=Moderate, 10=High)	9	

Appendix 3 - Aggregated Mobility Tracking Data Sets

The City of Dryden has been provided with multiple confidential datasets from Environics which include the MobileScapes Dataset for 2019 and 2021, Demographics Report, Distance Decay Report, and Visitor Heat Map. Key takeaways are summarized in the report and those datasets are confidential and available upon request from the City's Chief Administrative Officer.